



Your Success is Our Product

USER MANUAL
Operations Management System

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HMS

What is NAVIS HMS? HMS or Operations Management System is NAVIS' innovative, time-saving product. It is designed to streamline your operation, empower your employees, and improve your bottom line by instantly monitoring all the crucial activities of your day-to-day operations.

The first section of this manual is a brief walk-through of common HMS actions, in a step-by-step, "How To" format.

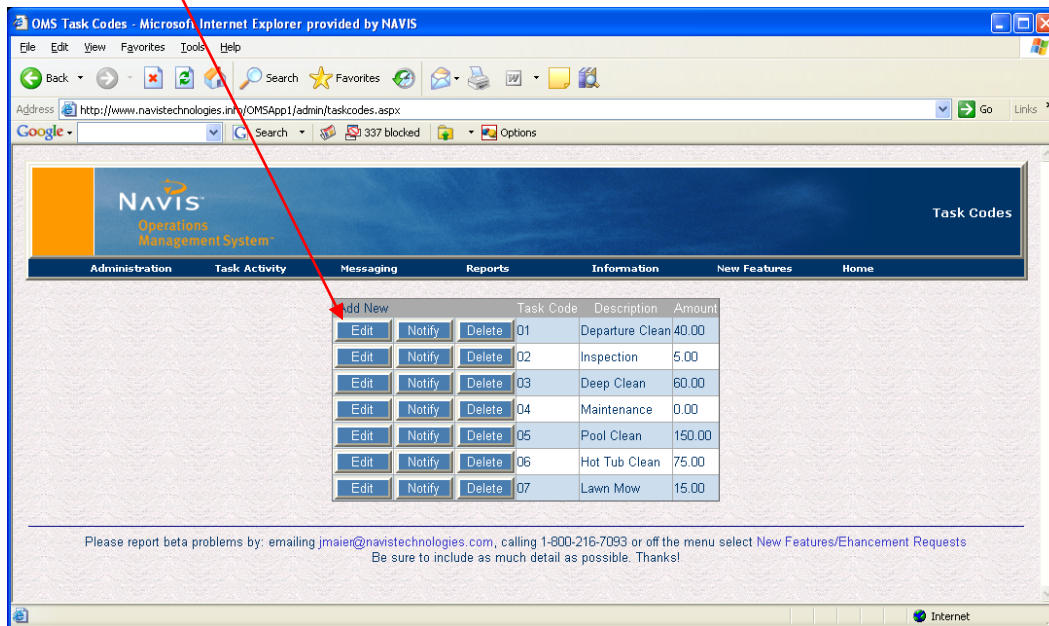
Next is a full outline of all the HMS functions. This outline contains a site-map of the website, with details and screen shots of all the functions available for customizing and utilizing the HMS system, as well as all of its available reports.

How Do I?

How do I add a new Task Code?

To add a new task, click on the “**Administration**” menu, and select “**Task Codes**” from the menu items.

Click “**Add New**”.



The screenshot shows the NAVIS Operations Management System interface. The top navigation bar includes links for Administration, Task Activity, Messaging, Reports, Information, New Features, and Home. The 'Administration' menu is expanded, showing 'Add New' and 'Task Codes'. The 'Task Codes' page displays a table with columns for Task Code, Description, and Amount. Below the table are buttons for Edit, Notify, and Delete for each task code.

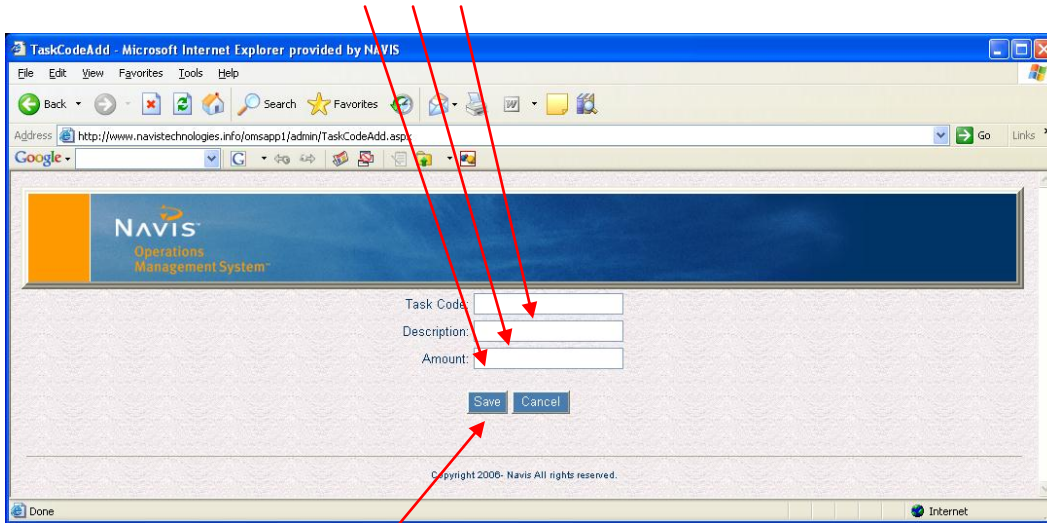
Task Code	Description	Amount
01	Departure Clean	40.00
02	Inspection	5.00
03	Deep Clean	60.00
04	Maintenance	0.00
05	Pool Clean	150.00
06	Hot Tub Clean	75.00
07	Lawn Mow	15.00

Please report beta problems by: emailing jmaier@navistechnologies.com, calling 1-800-216-7093 or off the menu select New Features/Enhancement Requests. Be sure to include as much detail as possible. Thanks!

Click inside of the **Task Code** Box and type in a new task number. This number should be 2 digits; 01 thru 99 and must be unique, not a number already assigned to an existing task.

Then, click inside of the **Description** box and enter the description of the new task.

Next, click inside of the **Amount** box if you want to assign a specific, non-changing amount to this task, no matter where the task is performed.

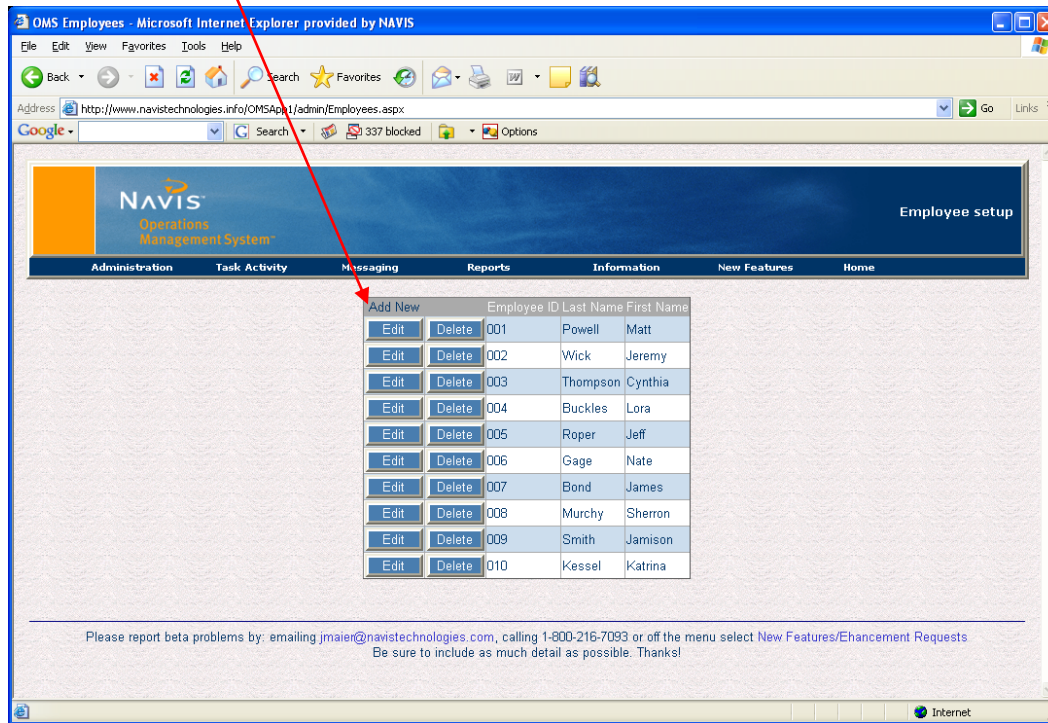


Finally, click on the **“Save”** button to save this new task.

How do I add a new Employee?

To add a new employee, click on the “**Administration**” menu, and select “**Employees**” from the menu items.

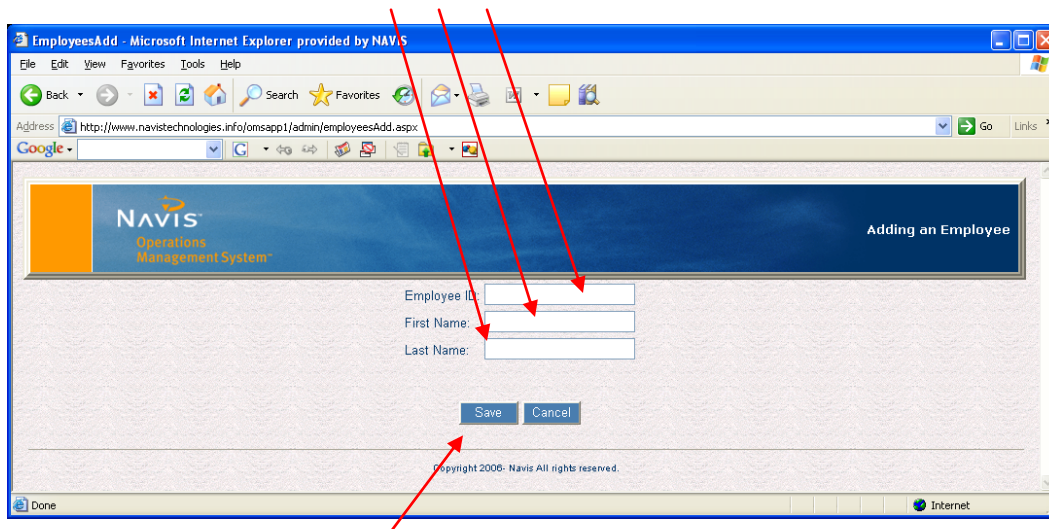
Click “**Add New**”.



Click inside of the **Employee ID** Box and type in a new employee number. This number needs to be 3 digits 001 thru 999 and must be unique; not a number already assigned to an existing employee.

Click inside of the **First Name** box and type in the new employee's first name.

Click inside of the **Last Name** box and type in the new employee's last name.

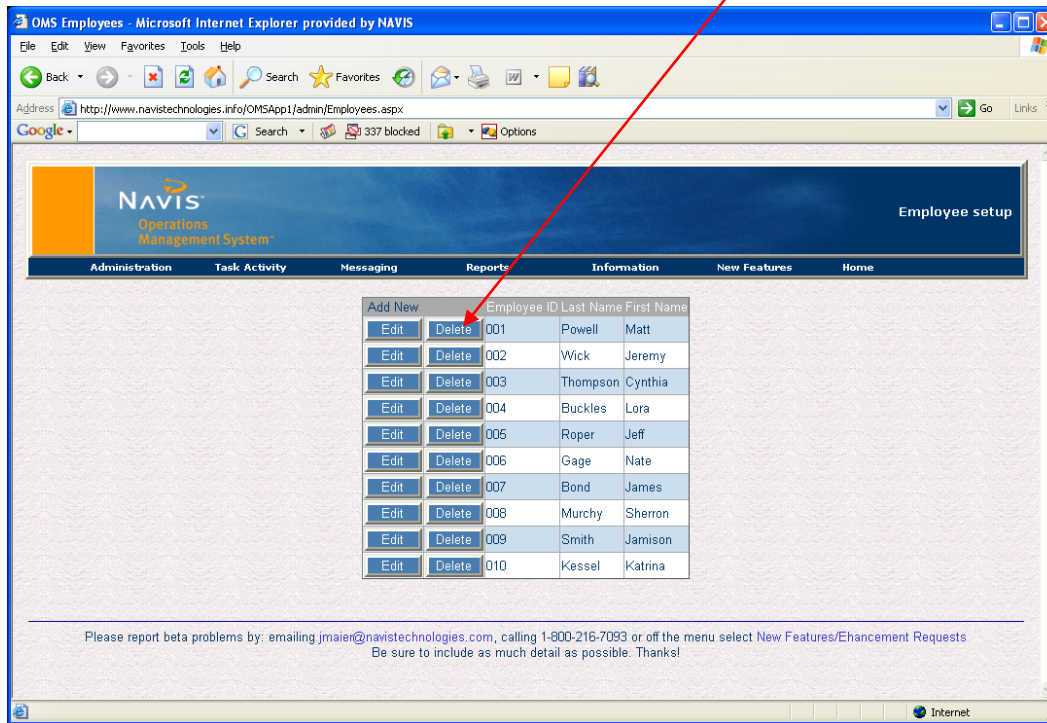


Finally, click on the **“Save”** button to save this new employee.

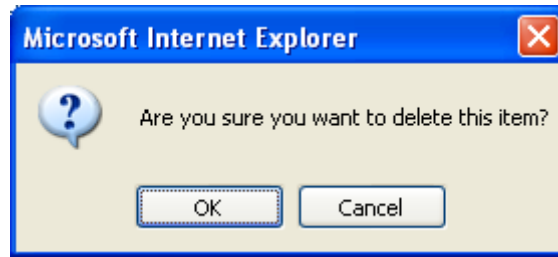
How do I delete an Employee?

To delete an existing employee, click on the “**Administration**” menu, and select “**Employees**” from the menu items.

Select the appropriate employee from the list and click “**Delete**”.



To confirm that you want to delete this employee, click “**OK**” on the dialogue box.

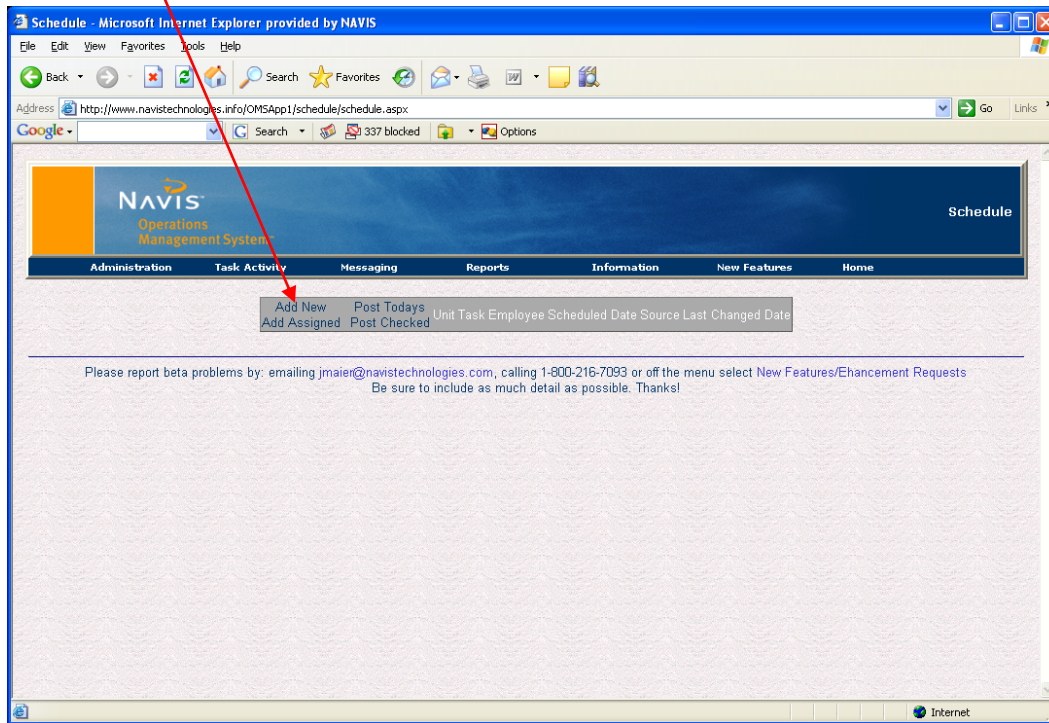


The selected employee will no longer show in the “**Employee**” screen, or appear in any reports.

How do I schedule Tasks?

To schedule a task, click on the “**Task Activity**” menu and select “**Schedule Task/WO**” from the menu items.

Click “**Add New**”.



From this screen, select the “**Task**” you are scheduling from the dropdown menu, and the “**Date**” you are scheduling the task for.

Check All
Clear All

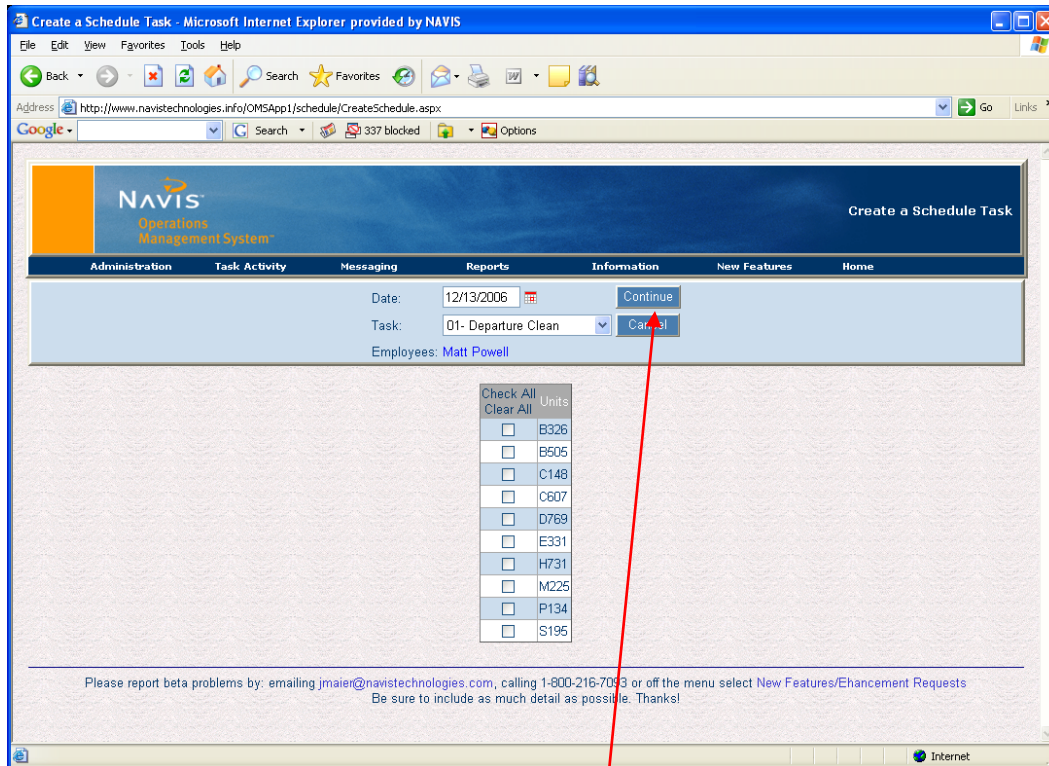
ID	Last Name	First Name
<input type="checkbox"/>	001 Powell	Matt
<input type="checkbox"/>	002 Wick	Jeremy
<input type="checkbox"/>	003 Thompson	Cynthia
<input type="checkbox"/>	004 Buckles	Lora
<input type="checkbox"/>	005 Roper	Jeff
<input type="checkbox"/>	006 Gage	Nate
<input type="checkbox"/>	007 Bond	James
<input type="checkbox"/>	008 Murchy	Sherron
<input type="checkbox"/>	009 Smith	Jamison
<input type="checkbox"/>	010 Kessel	Katrina

Please report beta problems by: emailing jmaier@navistechnologies.com, calling 1-800-216-7093 or off the menu select New Features/Enhancement Requests
Be sure to include as much detail as possible. Thanks!

If scheduling a task for a particular employee(s), place a check mark in the appropriate selection box next to employee’s “**ID**” number. It is not necessary to select an employee to create a scheduled task.

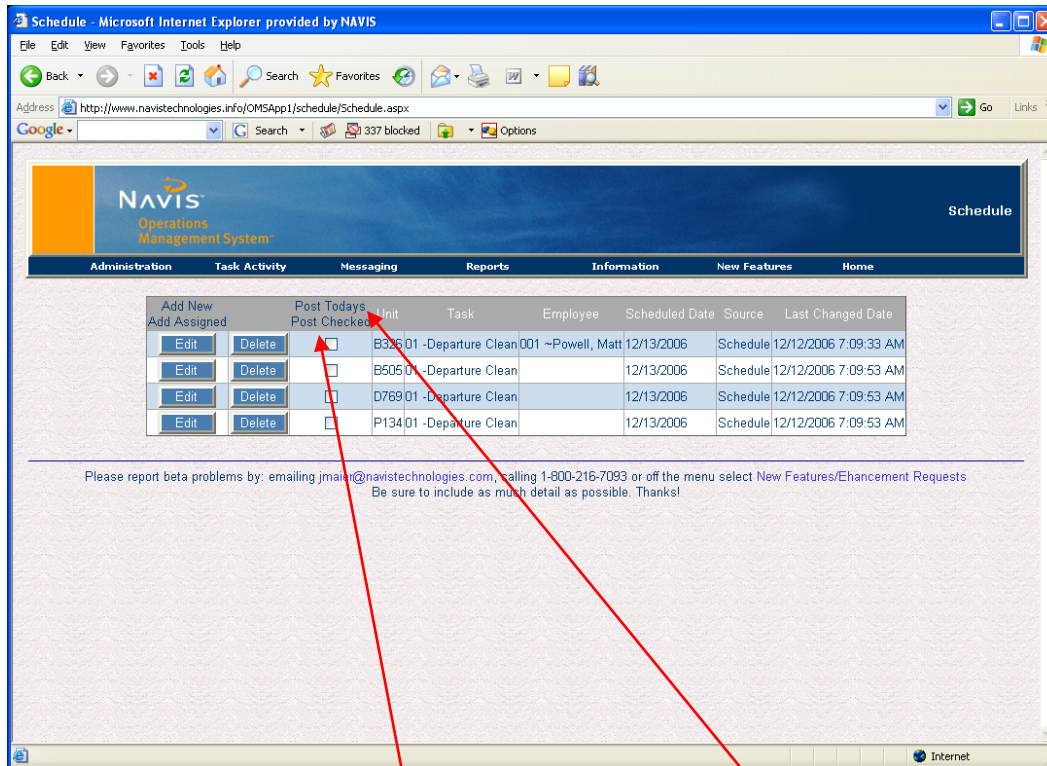
Click “**Continue**”.

From this screen, place a check mark in the appropriate selection boxes next to the unit(s) that you are scheduling this task for.



Once you have selected the unit(s), click “**Continue**”.

Your scheduled tasks will now show on the “**Schedule**” screen until they have been posted. They will also be available in the Schedule Report.



To post a scheduled task, place a check mark in the selection box next to the appropriate task and click “**Post Checked**”, or click on “**Post Today's**”. Clicking on “**Post Today's**” will put all of the tasks scheduled for today’s date onto the “**Unit Status**” screen. Any tasks that are posted, regardless of the Scheduled Date, will now appear on this screen and not the “**Schedule**” screen.

It is recommended that you do not post your scheduled tasks until the night before or the morning of the scheduled date.

How do I print a Schedule Report?

To print a Schedule Report, click on the “**Reports**” menu, and select “**Schedule Report**” from the menu items.

Select a “**Start Date**” and “**Thru**” date.

If you want the assigned task amount to show on the report, place a check mark in the selection box next to “**Include Anticipated Amount**”.

Check All	ID	First	LastName
<input type="checkbox"/>	001	Matt	Powell
<input type="checkbox"/>	002	Jeremy	Wick
<input type="checkbox"/>	003	Cynthia	Thompson
<input type="checkbox"/>	004	Lora	Buckles
<input type="checkbox"/>	005	Jeff	Roper
<input type="checkbox"/>	006	Nate	Gage
<input type="checkbox"/>	007	James	Bond
<input type="checkbox"/>	008	Sherron	Murchy
<input type="checkbox"/>	009	Jamison	Smith
<input type="checkbox"/>	010	Katrina	Kessel

If you want to print the report for all employees during the selected date range, click “**Check All.**” Otherwise click on the selection box next to the employee you want to view a report for.

Click “**Process.**”

You will need to select a format for viewing. Click either “**Excel (XLS)**”, or “**Acrobat (PDF)**”.

You will then be able to view and print the report. This report will show the Unit, Unit Notes if any, Address, Task, Scheduled Date and Anticipated Amount. It will also show you a total number of tasks, as well as a total dollar amount.

http://www.navistechnologies.info/OMSApp1/Reports/genReports/1399820.pdf - Microsoft Internet Explorer provided by NAVIS

Address <http://www.navistechnologies.info/OMSApp1/Reports/genReports/1399820.pdf>

NAVIS

Schedule Report -12/12/2006 Thru 12/13/2006

Employee Unit	Address	Task	Scheduled Date	Anticipated Amount
001- Powell, Matt B326	54326 Bear Dr	01- Departure Clean	12/13/2006	40.00
B505	17505 Brandywine Rd	01- Departure Clean	12/13/2006	40.00
D769	15769 Davis Rd	01- Departure Clean	12/13/2006	40.00
P134	1134 NE Paula Dr	01- Departure Clean	12/13/2006	40.00
Count:				4
Employee Total:				160.00

11.6 x 8.5 in

1 of 1

Done

Internet

How do I print an Employee Report?

To print an Employee Report, click on the “**Reports**” menu, select “**Employees**” from the menu items, and then select “**Report**” from the sub-menu items.

Select a “**Start Date**” and “**Thru**” date.

If you want each employee to appear on their own page, place a check mark in the selection box next to “**Appear on separate pages**”.

Check All	ID	First Name	Last Name
<input type="checkbox"/>	001	Matt	Powell
<input type="checkbox"/>	002	Jeremy	Wick
<input type="checkbox"/>	003	Cynthia	Thompson
<input type="checkbox"/>	004	Lora	Buckles
<input type="checkbox"/>	005	Jeff	Roper
<input type="checkbox"/>	006	Nate	Gage
<input type="checkbox"/>	007	James	Bond
<input type="checkbox"/>	008	Sherron	Murchy
<input type="checkbox"/>	009	Jamison	Smith
<input type="checkbox"/>	010	Katrina	Kessel

If you want to include any currently waiting tasks in the report, place a check mark in the selection box next to “**Include Waiting Tasks**”.

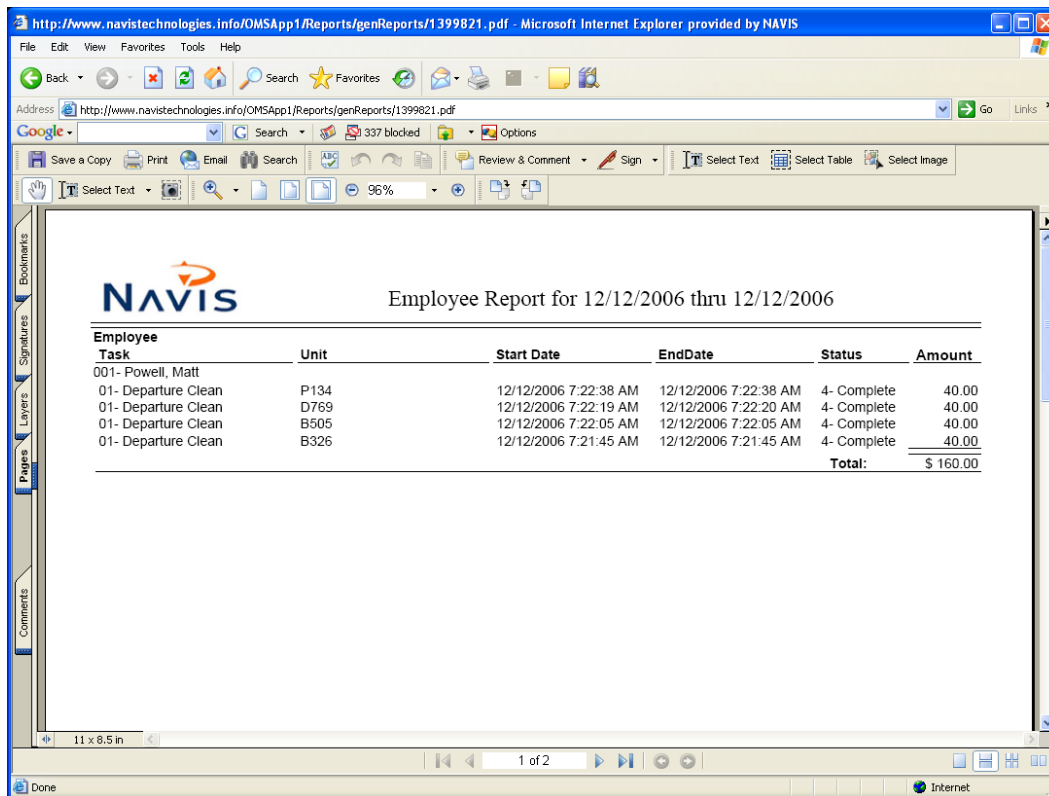
If you want to include any work orders in the report, place a check mark in the selection box next to “**Include Work Orders**”.

If you want to view the report for all employees during the selected date range, click “**Check All.**” Otherwise, place a check mark in the appropriate selection box next to the employee’s “**ID**”.

Then click “**Process.**”

You will need to select a format for viewing. Click either “**Excel (XLS)**”, or “**Acrobat (PDF)**”.

You will then be able to view and print the report. This report will show the Task, Unit, Start Date, End Date, Status and Amount of each task performed during the selected date range. The report will also show a total Amount paid for each employee.



Employee Report for 12/12/2006 thru 12/12/2006

Employee	Task	Unit	Start Date	EndDate	Status	Amount
001- Powell, Matt						
	01- Departure Clean	P134	12/12/2006 7:22:38 AM	12/12/2006 7:22:38 AM	4- Complete	40.00
	01- Departure Clean	D769	12/12/2006 7:22:19 AM	12/12/2006 7:22:20 AM	4- Complete	40.00
	01- Departure Clean	B505	12/12/2006 7:22:05 AM	12/12/2006 7:22:05 AM	4- Complete	40.00
	01- Departure Clean	B326	12/12/2006 7:21:45 AM	12/12/2006 7:21:45 AM	4- Complete	40.00
Total:						\$ 160.00

An amount is not shown or calculated for any tasks yet not completed.

New Features

With the release of HMS version 2.0, NAVIS has added some exciting new features that enhance your experience and increase overall functionality.

The first and most noticeable change is the new look. HMS has been updated to match the look and feel of the NAVIS website, as well as provide ease of navigation throughout. You will notice that all Menu options are now available in a Tool Bar across the top of the screen. This allows for navigation from screen to screen in a much more efficient and logical manner. Unlike the earlier versions of HMS, where it was necessary to click the back button, Menu navigation is now accessible from every screen within HMS 2.0.

The second new feature is the enhanced Tool-Tip data on the Unit Status screen. By holding your mouse pointer over one of the Unit buttons, you may now view the most current task details without having to select the unit and view the Task Status. The types of information shown on the tool tip are: Task performed, Task Status, Occupancy State, and Date & Time of change in Status. If you utilize the Energy Sentinel service, the current Temperature, as well as the Date & Time of last reporting is displayed.

Another feature of HMS 2.0 is the addition of an expiration date for the Guest Notify function. This allows you to set a date to have the notification automatically cancel if the “trigger” event was never properly updated from within the unit by an Employee. This will prevent HMS from calling your guests, a week after they have arrived to let them know that...“your vacation rental is now ready for occupancy”.

A new addition to the HMS Reports is the Average Calculations Report. This is a statistical analysis report which can be used to evaluate several different sets of data. Such as Time Spent by Employee per Unit per Task. It is especially helpful for those who pay their employees on a “piece rate”. It will provide a dollar per minute breakdown of the data you are used to seeing in the other reports.

The Multiple Occupancy Change screen is a new time-saving feature to allow you to change the occupancy of several units at once; unlike earlier versions of HMS, where it was necessary to edit each unit one at a time.

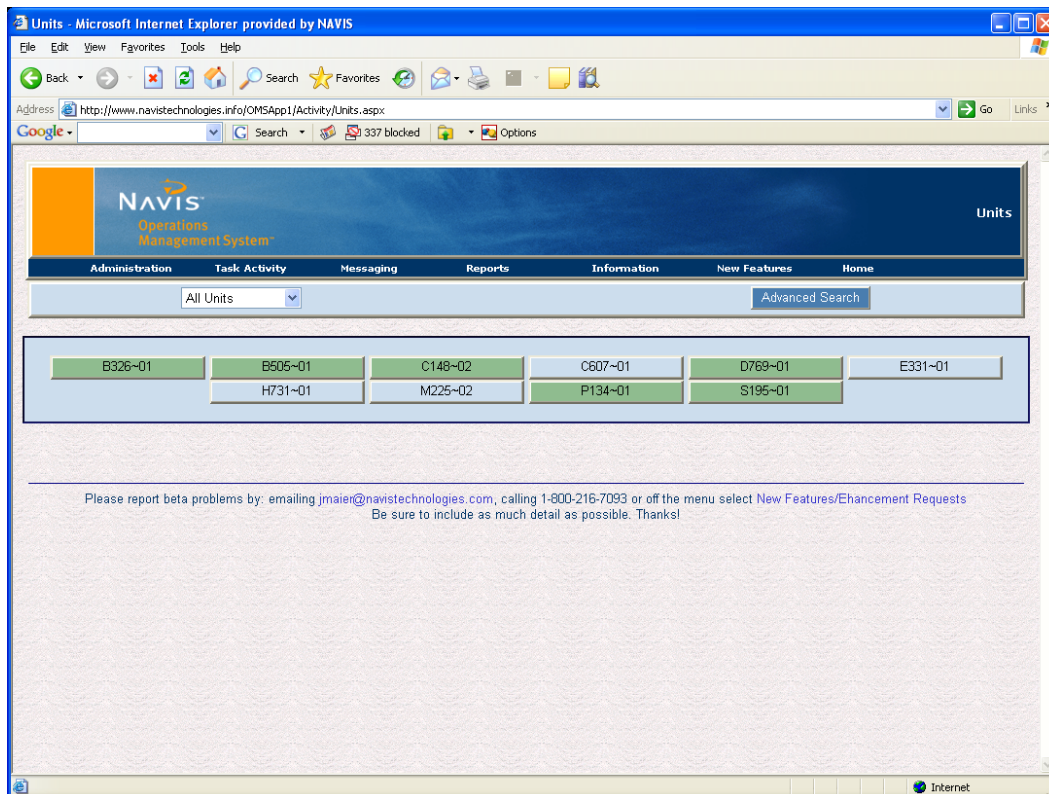
Finally a new feature has been added to the Scheduling Set-up. The Assign Scheduling section is used for setting up specific units in an “employee group”, to make the daily/weekly scheduling more efficient by showing only the pre-selected units available for each group. Under the original scheduling option it was necessary to go through the entire unit list, and select those units you wished to assign to an employee. With the Employee Group, you can create a much smaller unit list to make this unit selection process more streamlined.

All of the above additions to HMS 2.0 are covered in greater detail in the manual.

HMS Site Documentation

HMS Home Page

The HMS Units Page is the top level navigation screen for operating the HMS System. All Menus are accessible in a toolbar across the top of the screen, below the NAVIS logo. Hovering your pointer over each Menu header will open a Sub-Menu for the selected Menu.



Administration

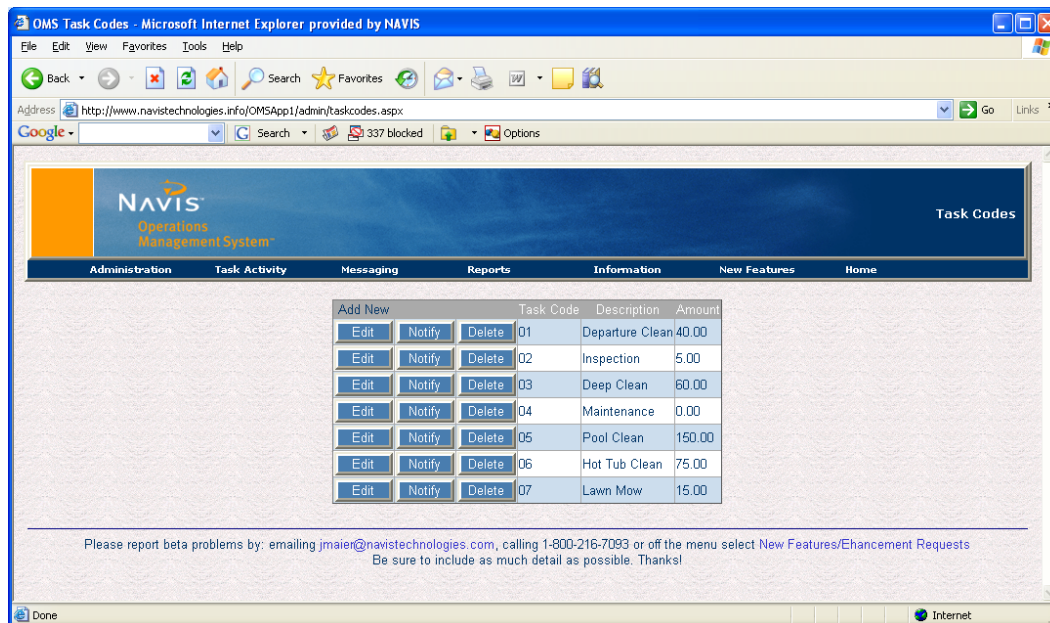
The HMS Administration section of the website is the area where setup and configuration are performed. This includes adding Tasks and Employees for tracking activity with the HMS system.

There are two essential administrative functions to HMS that are not found on this Menu. They are My Units and Misc. Database Maintenance.

Task Codes

A task code consists of a two-digit number and a short description. Each task must be created for any action performed on a unit that will be tracked by HMS.

Some common tasks include: Departure Clean, Inspection, Pool Cleaning, Carpet Cleaning, and Winterization.



The screenshot shows the NAVIS Operations Management System web application. The browser window title is "OMS Task Codes - Microsoft Internet Explorer provided by NAVIS". The address bar shows the URL: <http://www.navistechnologies.info/OMSApp1/admin/taskcodes.aspx>. The page features a navigation menu with links: Administration, Task Activity, Messaging, Reports, Information, New Features, and Home. The main content area displays a table of task codes with columns for Task Code, Description, and Amount. Each row includes buttons for Edit, Notify, and Delete. Below the table, there is a footer message: "Please report beta problems by: emailing jmaier@navistechnologies.com, calling 1-800-216-7093 or off the menu select New Features/Enhancement Requests. Be sure to include as much detail as possible. Thanks!"

Add New			Task Code	Description	Amount
Edit	Notify	Delete	01	Departure Clean	40.00
Edit	Notify	Delete	02	Inspection	5.00
Edit	Notify	Delete	03	Deep Clean	60.00
Edit	Notify	Delete	04	Maintenance	0.00
Edit	Notify	Delete	05	Pool Clean	150.00
Edit	Notify	Delete	06	Hot Tub Clean	75.00
Edit	Notify	Delete	07	Lawn Mow	15.00

Add New

To add a new task code, click on the Add New link.

Task Code

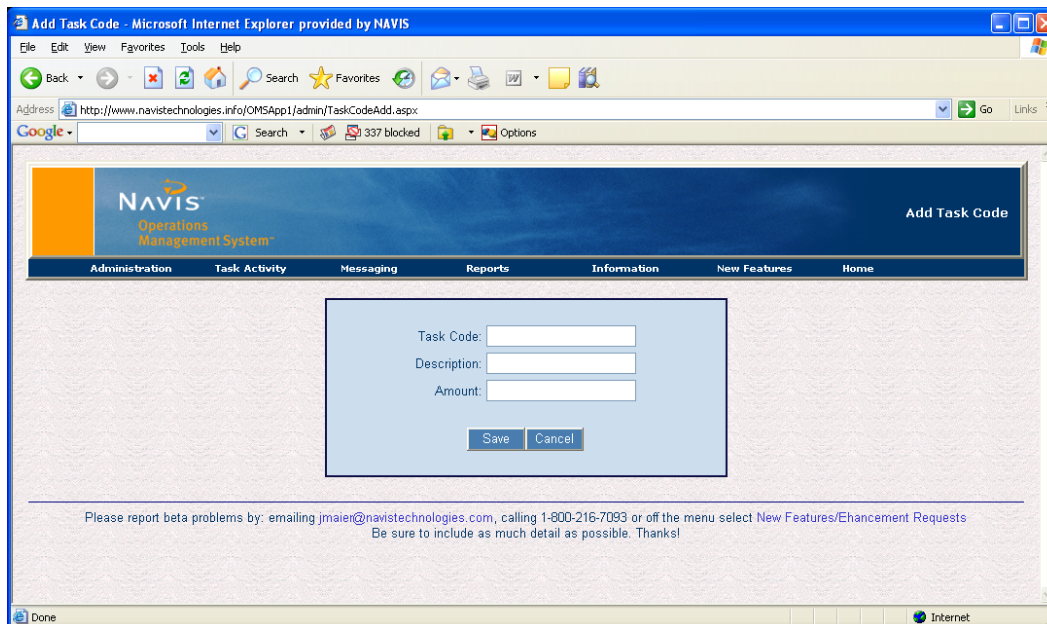
The Task Code is a two-digit number assigned to each task. HMS will allow for up to 99 task codes: 01 – 99.

Description

The Task Description is a short, written description of the tasks your employees will be performing in each unit. (30 character limit)

Amount

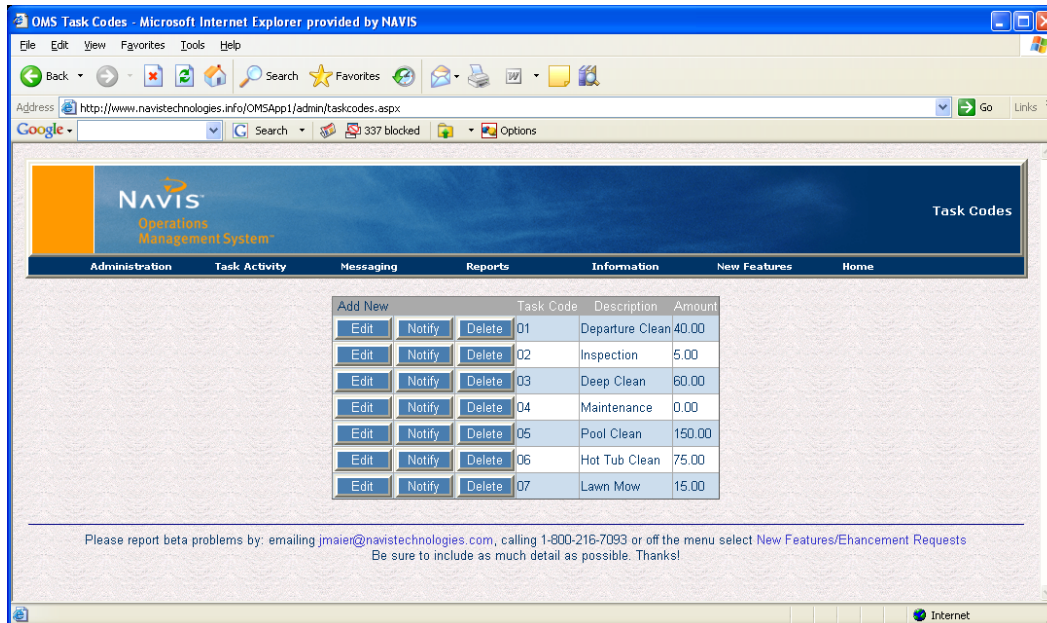
The Task Amount is the default amount paid out to an employee when this task is completed in a unit. Typically this is referred to as a “piece rate” or “piece amount”. (If you do not use “piece rates”, leave blank)



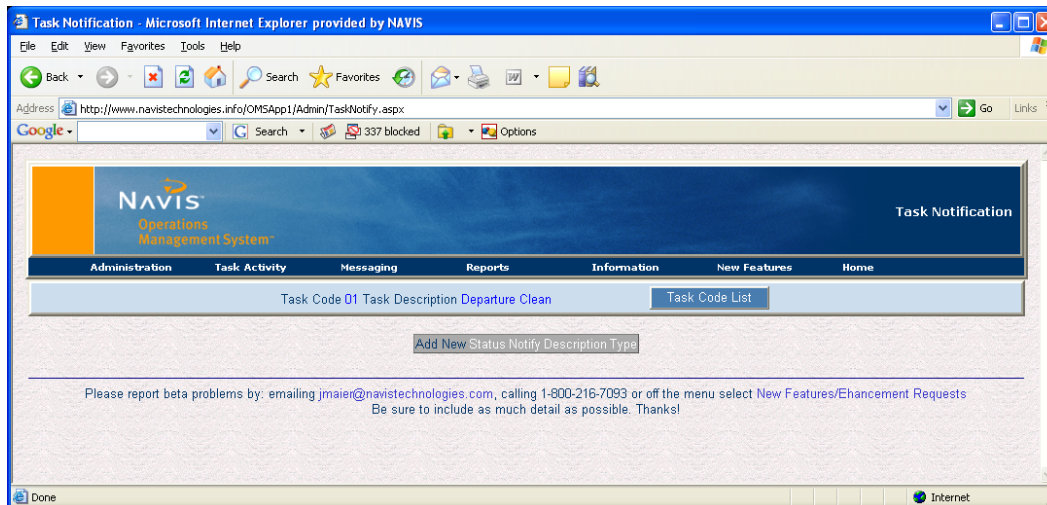
The screenshot shows a web browser window titled "Add Task Code - Microsoft Internet Explorer provided by NAVIS". The address bar shows the URL: <http://www.navistechnologies.info/OMSApp1/admin/TaskCodeAdd.aspx>. The page features the NAVIS logo and a navigation menu with links: Administration, Task Activity, Messaging, Reports, Information, New Features, and Home. The main content area contains a form titled "Add Task Code" with three input fields: "Task Code:", "Description:", and "Amount:". Below these fields are "Save" and "Cancel" buttons. At the bottom of the page, there is a footer message: "Please report beta problems by: emailing jmaier@navistechnologies.com, calling 1-800-216-7093 or off the menu select New Features/Enhancement Requests. Be sure to include as much detail as possible. Thanks!"

Notify

The notify option, provides the ability to automatically send a notification via phone, fax, or email any time the status of that task is changed. The notification destinations must be added via the guest connections portion of the website, prior to adding any new notification.

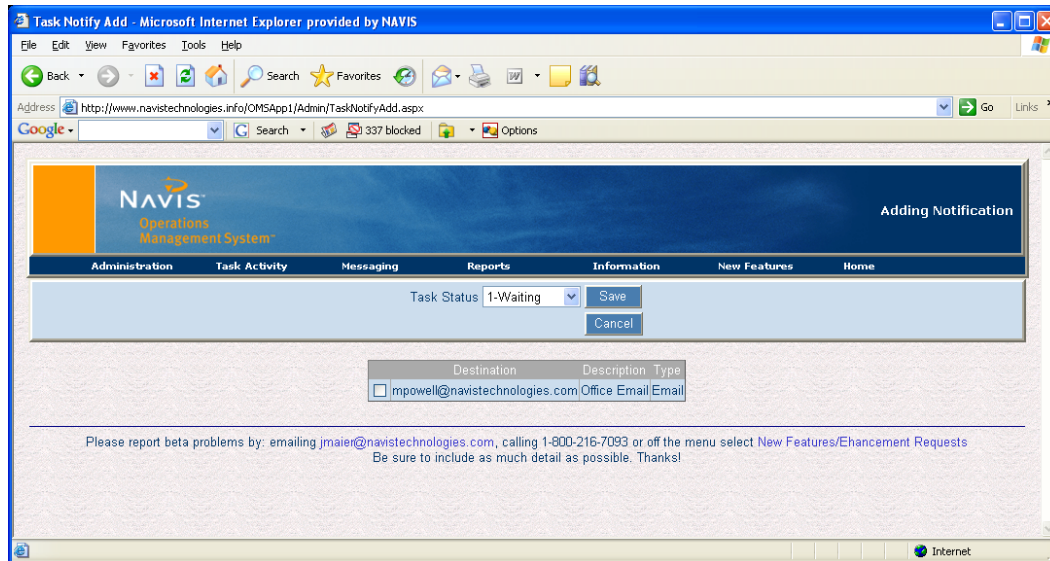


Each notification must be setup based upon a change in status for a given task.



Add New

Click on the Add New link to add a new notification.



Task Status: 1-Waiting [Save] [Cancel]

Destination	Description	Type
<input checked="" type="checkbox"/> mpowell@navistechnologies.com	Office Email	Email

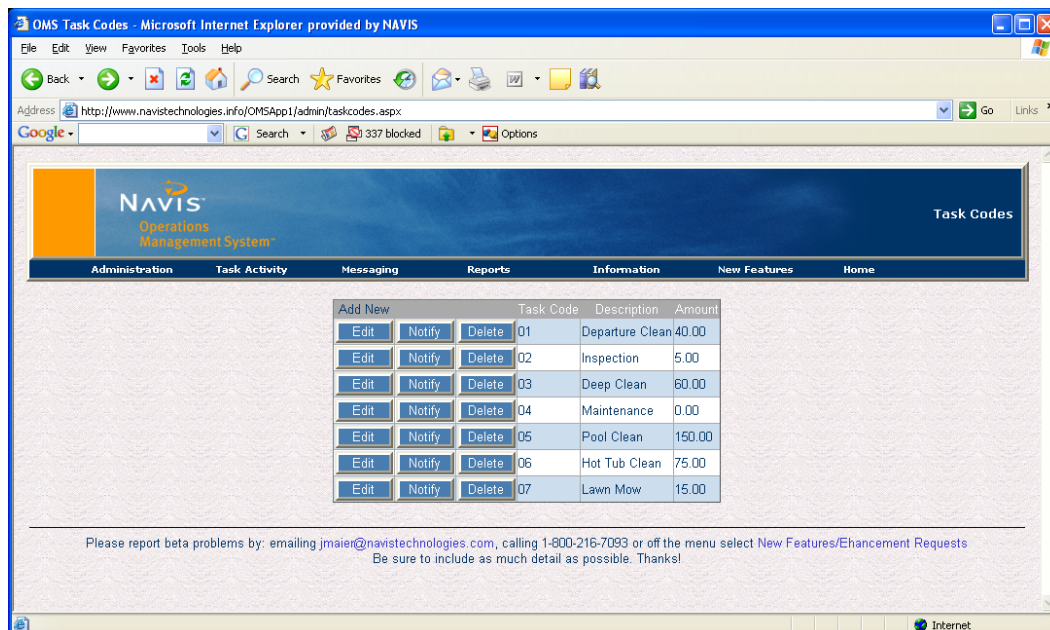
Please report beta problems by: emailing jmaier@navistechnologies.com, calling 1-800-216-7093 or off the menu select New Features/Enhancement Requests. Be sure to include as much detail as possible. Thanks!

Task Status

The “Task Status” drop-down menu is used to select a status, which will create the trigger to send the notification. Each time a task is associated with a unit it will be in one of the following four status settings: 1-Waiting, 2-In Process, 3-Incomplete, and 4-Complete. Typically the status chosen for sending a notification is the “Complete” status.

Select

Destinations for the notification can be selected by placing a check mark in the appropriate selection box next to the desired destination. Single or multiple destination(s) can be selected at the same time for the same notification.



Task Codes

Add New			Task Code	Description	Amount
[Edit]	[Notify]	[Delete]	01	Departure Clean	40.00
[Edit]	[Notify]	[Delete]	02	Inspection	5.00
[Edit]	[Notify]	[Delete]	03	Deep Clean	60.00
[Edit]	[Notify]	[Delete]	04	Maintenance	0.00
[Edit]	[Notify]	[Delete]	05	Pool Clean	150.00
[Edit]	[Notify]	[Delete]	06	Hot Tub Clean	75.00
[Edit]	[Notify]	[Delete]	07	Lawn Mow	15.00

Please report beta problems by: emailing jmaier@navistechnologies.com, calling 1-800-216-7093 or off the menu select New Features/Enhancement Requests. Be sure to include as much detail as possible. Thanks!

Edit

Click the [Edit](#) link to change the parameters on existing tasks.

Task Code

This field cannot be edited as it is the key identifying field for tasks within the task table.

Task Description

Changes to the task description field will be associated with the corresponding task code number in all future and historical reports.

Task Amount

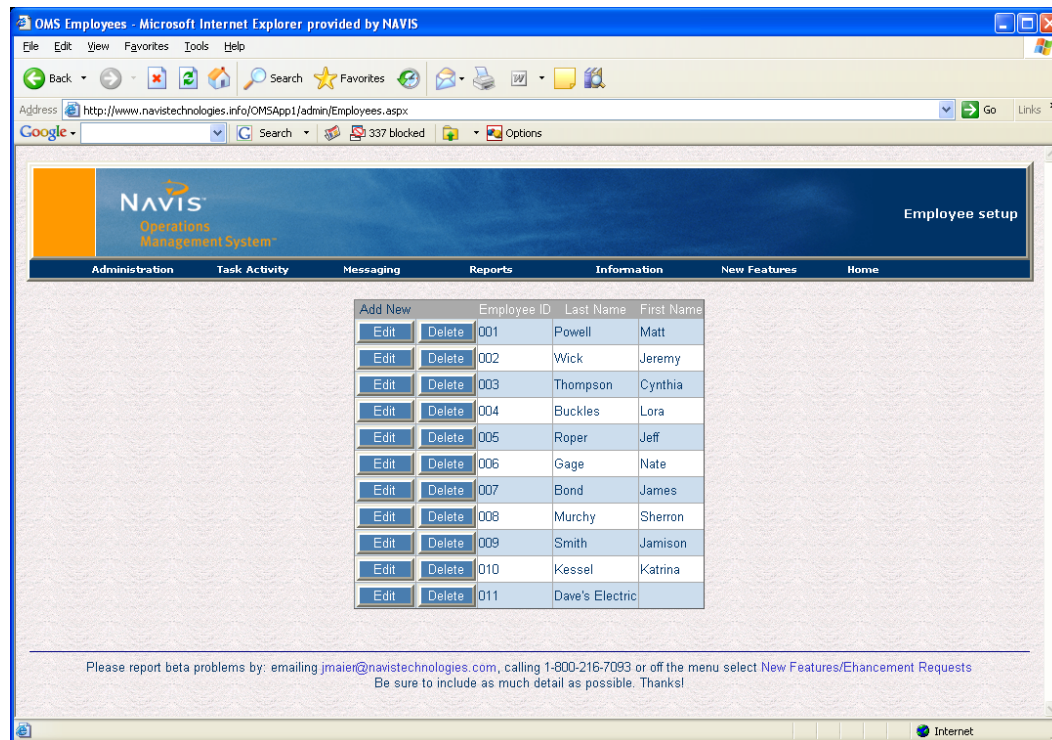
It is recommended that the Task Amount field be set when the value of the task is the same for all units. For example, delivering firewood may be set to the same value for all units, but the cost of cleaning will usually vary from unit to unit, and therefore can be set in the Unit Configuration section.

Delete

The [Delete](#) link deletes the task on the corresponding row. Any historical data associated with this task code, will remain in the system for 90 days and be displayed on any applicable reports. However, the description will no longer be displayed.

Employees

The Employees section is where employees are listed in HMS. It will allow you to add, edit, and delete employees from HMS. The list of employees consists of a three-digit code followed by the employee name. Every employee or outside vendor that will be logging into the system should be entered into HMS with an ID number and a name.



Add New

Click on the Add New link to enter your employees and vendors into HMS. Each entry must be assigned a unique ID# and a last name. A first name is not necessary.

The screenshot shows a web browser window titled "Add an Employee - Microsoft Internet Explorer provided by NAVIS". The address bar shows the URL "http://www.navistechnologies.info/OMSApp1/admin/EmployeeAdd.aspx". The page features the NAVIS logo and a navigation menu with links: Administration, Task Activity, Messaging, Reports, Information, New Features, and Home. The main content area is titled "Adding an Employee" and contains a form with three input fields: "Employee ID:", "First Name:", and "Last Name:". Below these fields are "Save" and "Cancel" buttons. At the bottom of the page, there is a footer message: "Please report beta problems by: emailing jraier@navistechnologies.com, calling 1-800-216-7093 or off the menu select New Features/Enhancement Requests. Be sure to include as much detail as possible. Thanks!"

There are a maximum of 999 different numbers (001 – 999) which may be used for the Employee ID. The First Name field has a 15 character limit, while the Last Name field has a 30 character limit.

Edit

The Edit link is used to change the details for the selected employee ID. Similar to task codes, a change to the employee name field will be reflected in all reports future and historical for the selected Employee ID. (For example, if a new employee is assigned an ID# that was used by a former employee, any subsequent reports processed for dates prior to the start date of the new employee, will show the name of the new employee for tasks performed by the former employee.) In order to avoid this situation, it is recommended you do not re-use an employee ID for a period of 90 days after the departure of the previous employee.

Employee ID

The Employee ID field cannot be updated, as it is the unique number used to identify each specific employee or vendor.

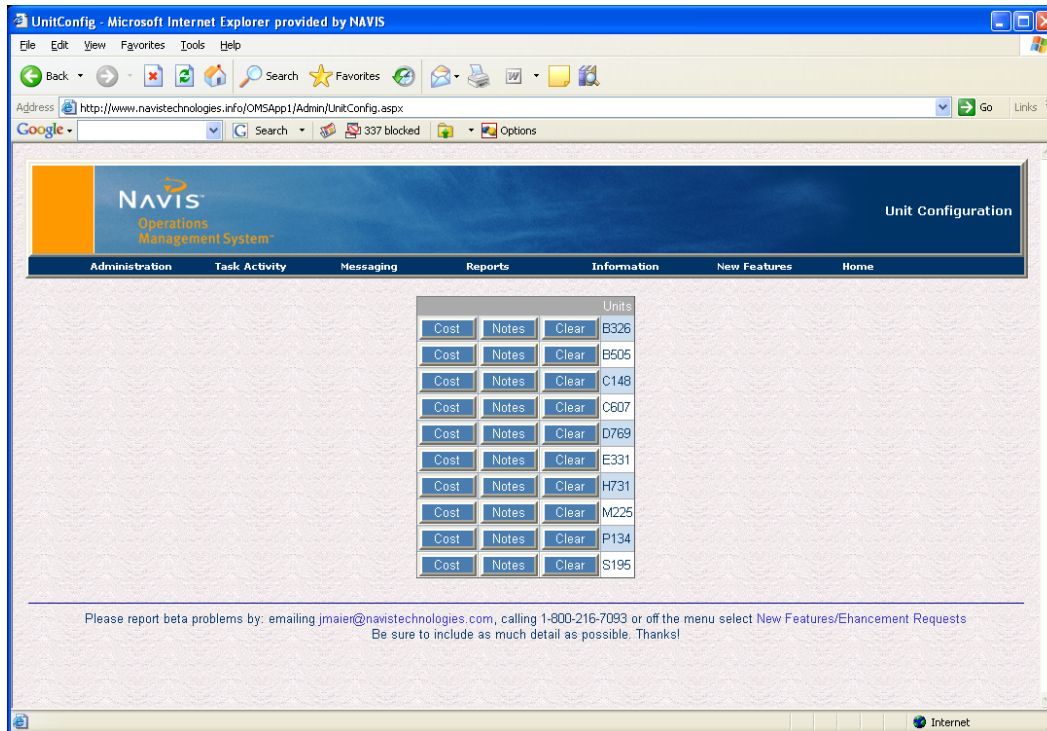
Delete

The Delete link will remove this Employee name and ID.

Unit Configuration

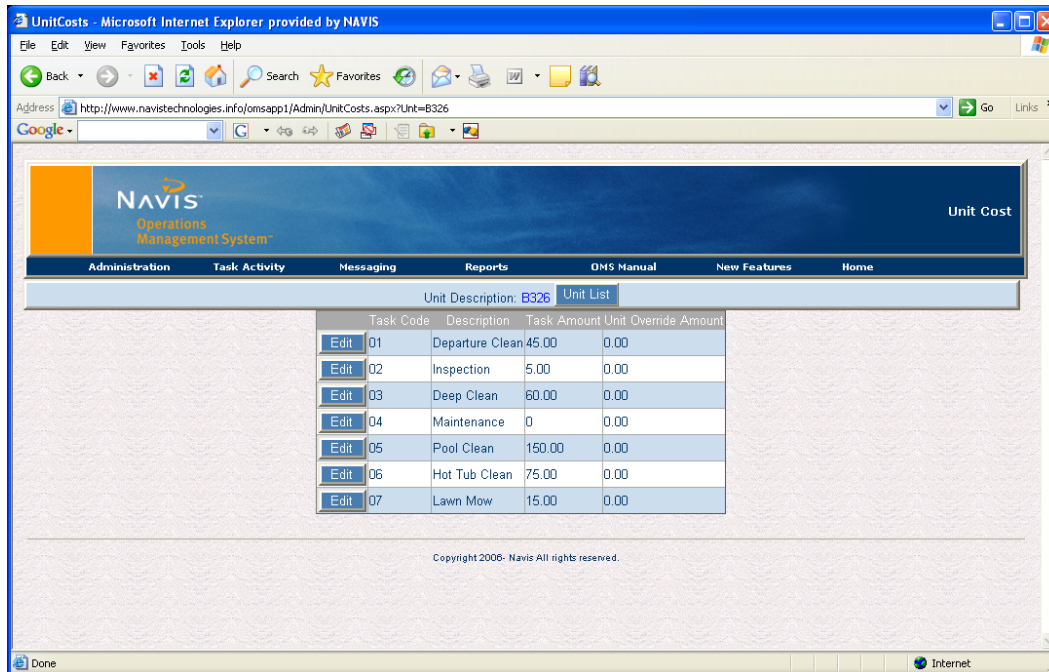
The Unit Configuration section is the area where custom information for each unit can be added. The types of information entered here are the unit-specific Task Amounts and Unit Notes.

The Unit Notes added in this section can be included on the daily reports for each employee's scheduled task list.



Cost

The Cost link opens the Unit Cost page. This is where you will enter the unit-specific task amounts. The costs entered here, will override any amount previously entered in the Task Code section.



Edit

The Edit tab unlocks the Unit Override Amount for editing. When finished, select Update to save specified amount.

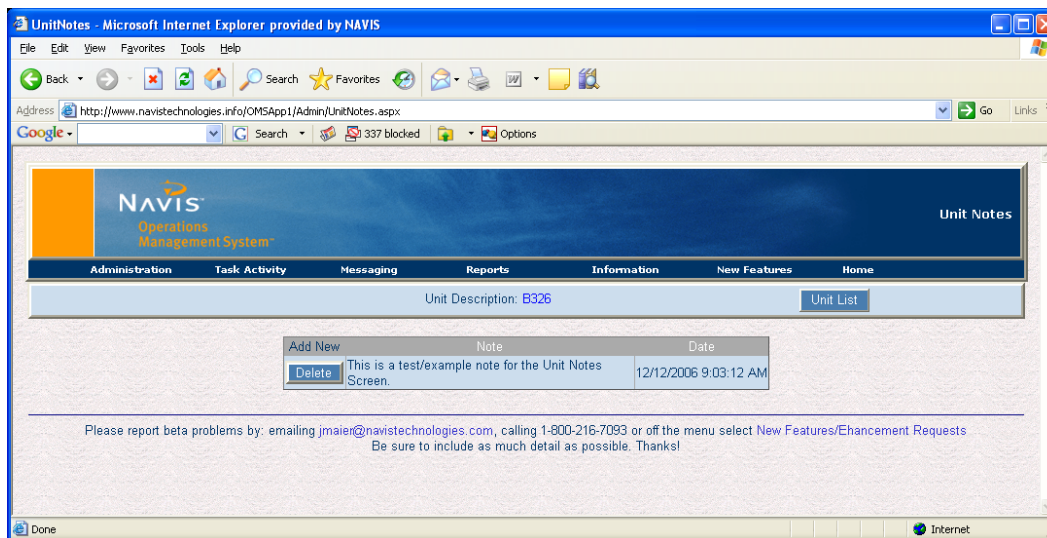
Unit Override Amount

The Unit Override Amount is the “override” value of a particular task for this specific unit. Any time this task is performed within the unit, the override amount will now be shown instead of the task amount. (This will not append any historical reports, but rather show the changes from that point on.)

Notes

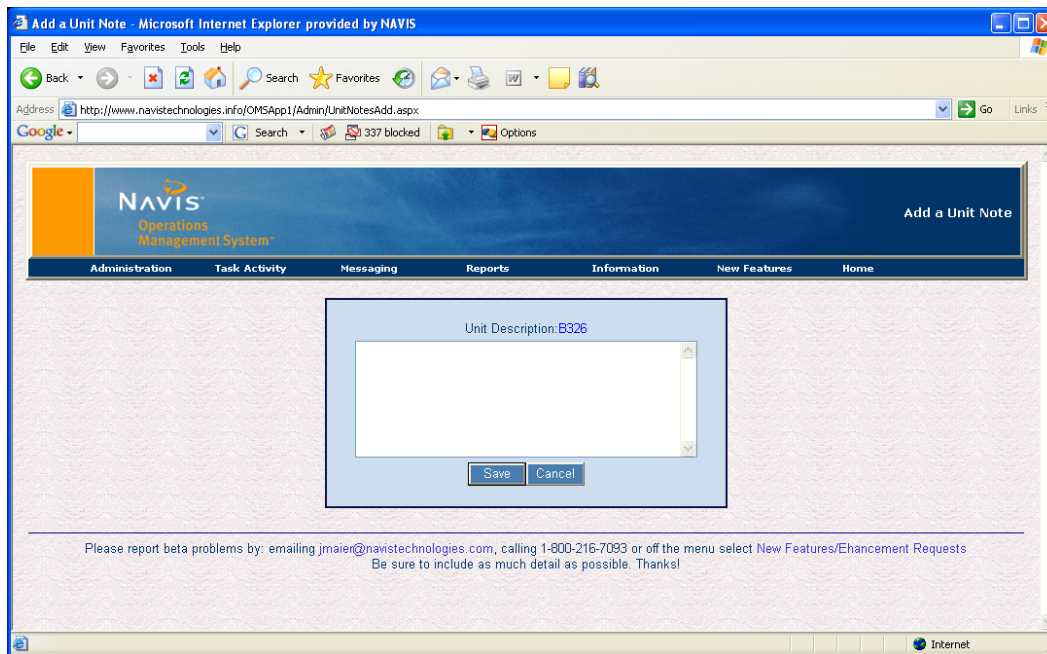
The Notes section is where you can add specific information about the unit or special instructions for your employees. All notes added here can be included on the Employee Notes Report as well as the Schedule Report.

For example, you might note specific cleaning products to be used on this home, or special instructions to prepare the home for an owner stay.



Add New

Click on the Add New link to add a new note. Each new note added will be displayed on the Unit Notes screen in chronological order.



The text block on the Add a Unit Note screen will facilitate a note of up to 300 characters.

Delete

Click Delete to remove a specific note.

Clear

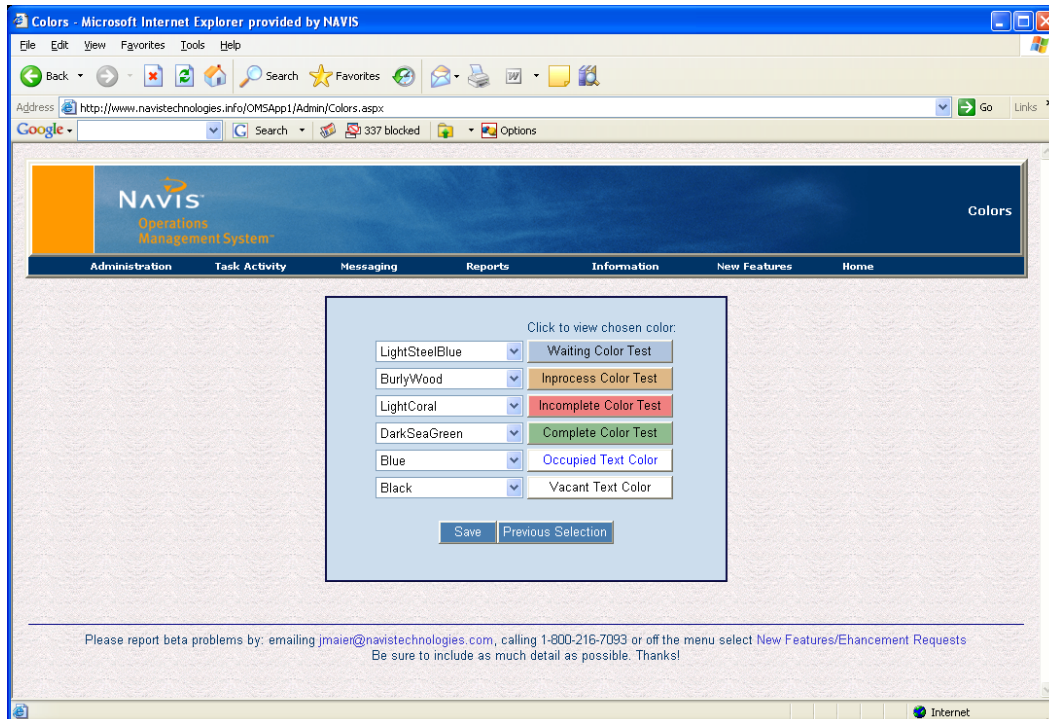
The Clear button confirms the choice to clear all notes and unit override costs for the selected unit.

HMS Configuration

The HMS Configuration section provides the ability to customize the color scheme of the HMS system.

Colors

HMS allows the user to customize the colors on the “Units” screen. These are used as a visual cue to show the task and occupancy status of each unit displayed.



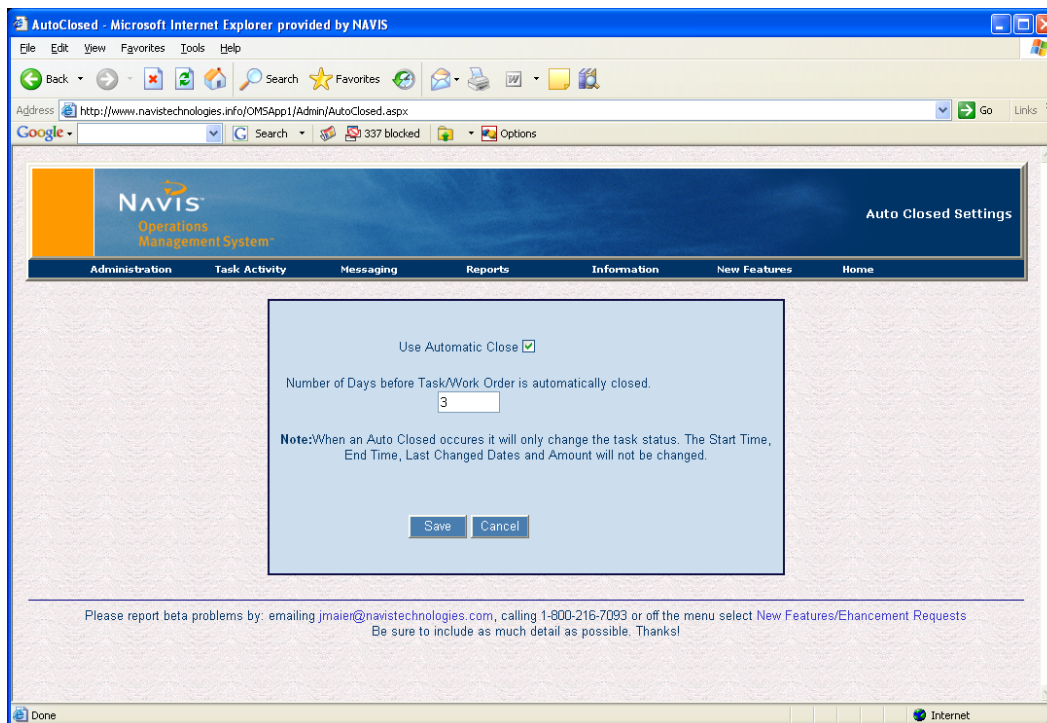
Colored Boxes & Colored Text

Use the dropdown menus to select a color for each item. Clicking on the corresponding button will give you a preview of each selected color.

It is recommended that you select a color scheme that is easy to read and view, as these selections will show up on the “Units” screen.

Auto Closed

The Auto Closed feature allows the system to be configured to automatically close an open task after a specified number of days. It negates the need to manually close each open task that an Employee did not properly update from within the unit.

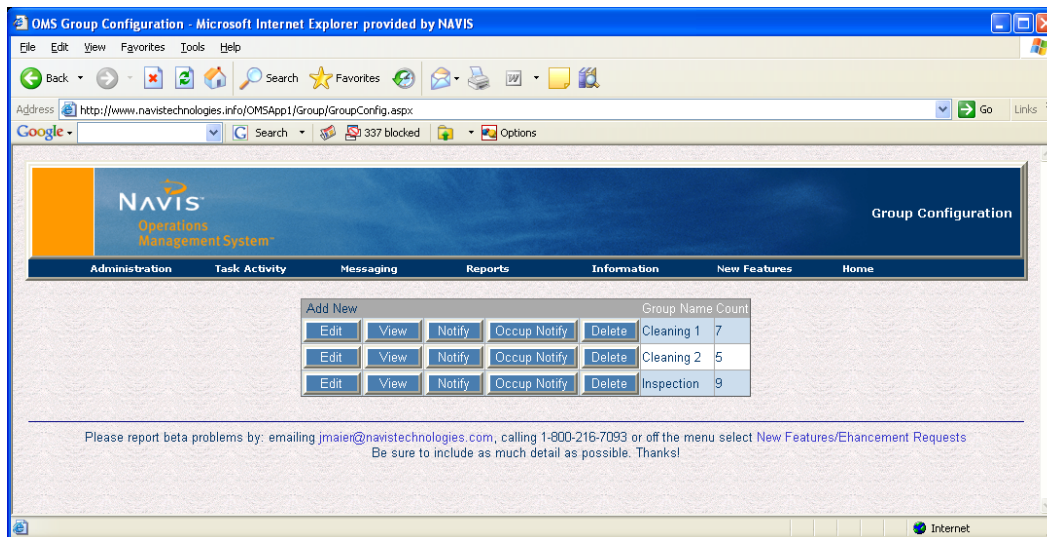


Group Configuration

Group Configuration is the area used to place units in a group for Notification, for Assign Scheduling, and to View the units by their group.

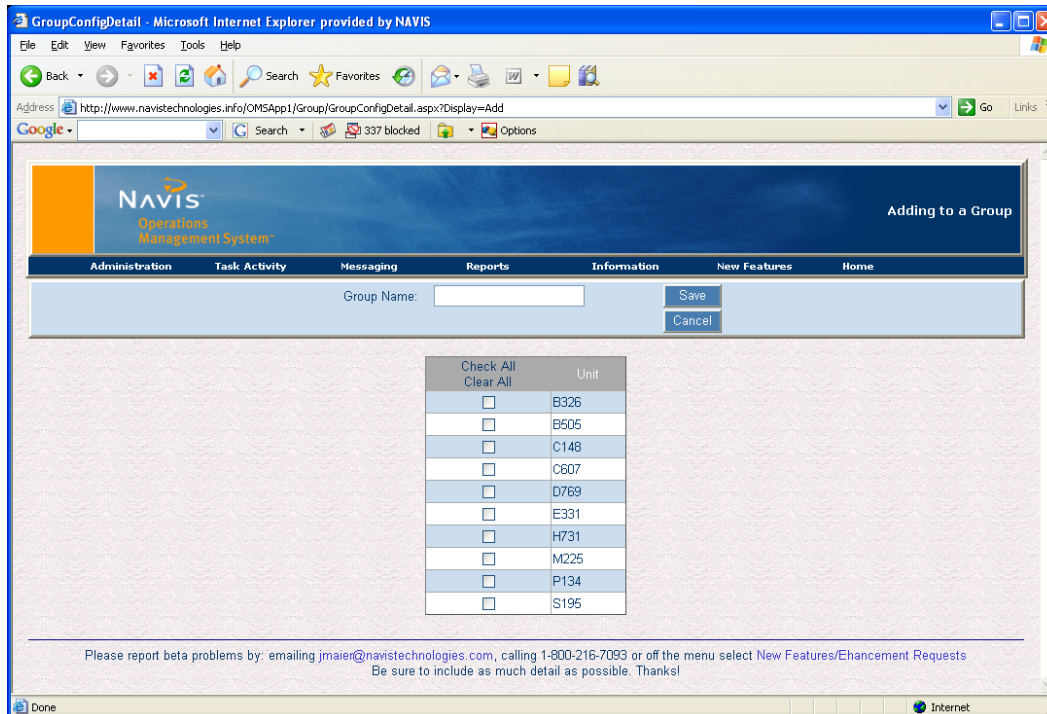
Notification

Upon completion of a specified task within the determined group, HMS will send a notification to the specified destination. A good example for use of this feature is to place all units covered by a single inspector into one group. Any time a cleaning task is set to a “Complete” status, HMS will notify the inspector that cleaning is now done and he may proceed with his inspection of the unit.



Add New - Group

Click the [Add New](#) link add your notification groups.



GroupConfigDetail - Microsoft Internet Explorer provided by NAVIS

Address: http://www.navistechnologies.info/OMSApp1/Group/GroupConfigDetail.aspx?Display=Add

NAVIS Operations Management System

Adding to a Group

Administration Task Activity Messaging Reports Information New Features Home

Group Name: Save Cancel

Check All Clear All	Unit
<input type="checkbox"/>	B326
<input type="checkbox"/>	B505
<input type="checkbox"/>	C148
<input type="checkbox"/>	C607
<input type="checkbox"/>	D769
<input type="checkbox"/>	E331
<input type="checkbox"/>	H731
<input type="checkbox"/>	M225
<input type="checkbox"/>	P134
<input type="checkbox"/>	S195

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Group Name

The “Group Name” field can be filled in with any name that you choose. It is recommended that you chose one that represents the units or the group you are creating. For example; if creating and inspection group for one specific employee, you can use the Inspectors name as the group name.

Select

Use the Selection Boxes to indicate which units are in the current group. A [Check All](#) and [Clear All](#) functions are also available. (Any new units added to HMS after a group is made will need to be added to each individual group manually. HMS will not automatically add the unit to the group.)

Edit

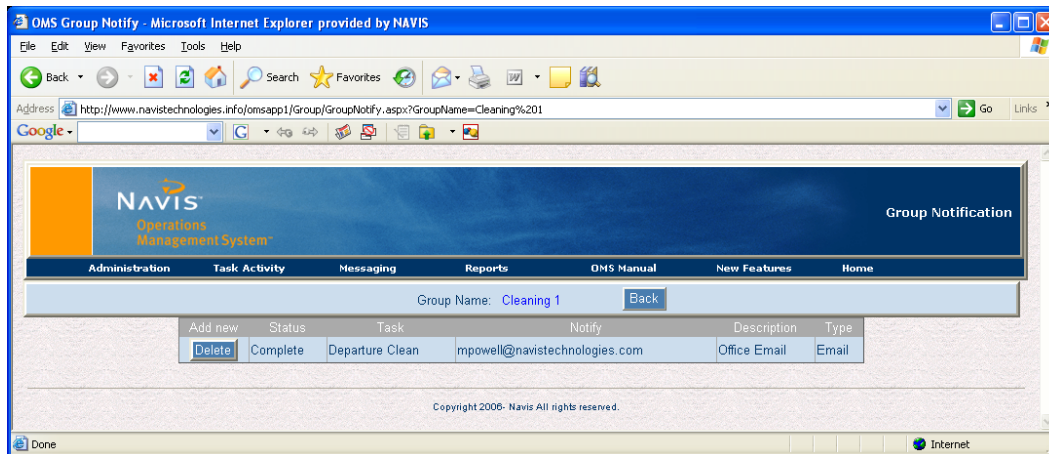
The [Edit](#) button navigates to a page that will allow you to add or remove units from a group.

View

The [View](#) button displays the page containing a list of all units in the selected group.

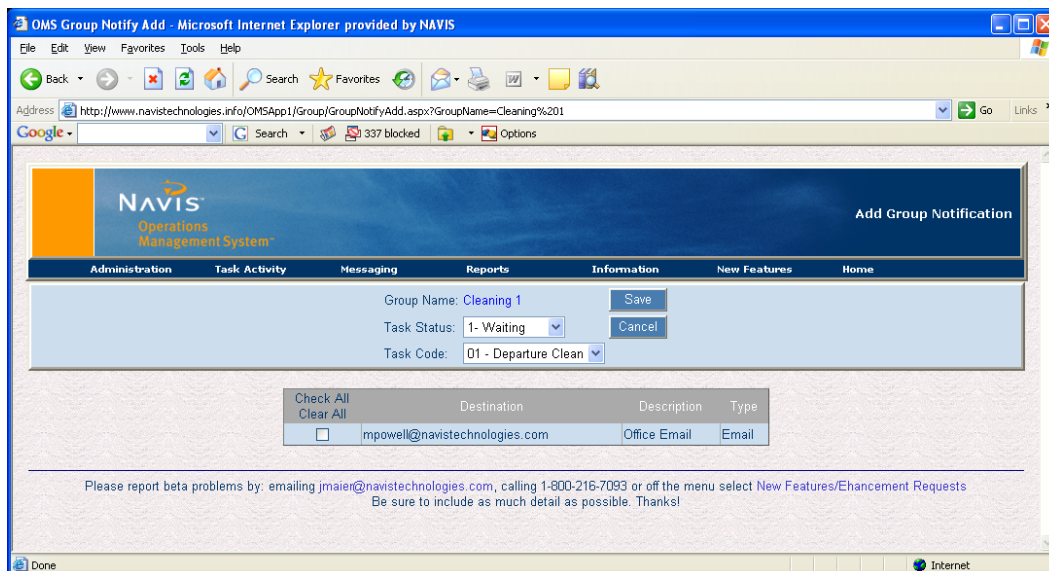
Notify

The Notify tab on the Group Configuration page opens the Group Notification page. This is used to set up notifications for a specific group. A notification is triggered when a task is changed to the chosen status. At that time any contacts in the selected group will be notified. (For example, the inspector responsible for inspecting all houses in this group could be selected for notification when the Task Code “Departure Clean” changes to a “Complete” status.)



Add New

The Add New link is used to add a new group notification. The options that must be selected for each Group Notify are: Task Status, Task Code, and the destination of the contact to be notified.



Task Status

The Task Status dropdown is used to select the status that will trigger the notification event.

Task Code

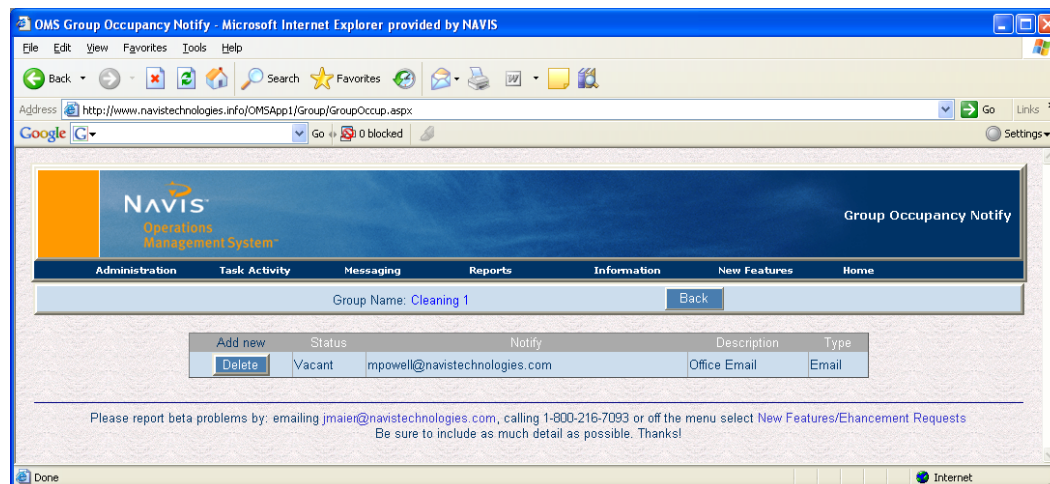
The Task Code dropdown is used to select the task code that, when placed into the Task Status specified above, will trigger the notification event.

Select

The Select column contains the selection boxes used to indicate which contact(s) should be notified in the event that the notification criteria are met. Any Additional Contacts may only be added through the Guest Connections - Misc. Database options.

Occup Notify

The Occup Notify button will open up the “Group Occupancy Notify” screen. This screen is used to add a notification to a specified group upon the change in Occupancy of a specified unit.



Add New

Click the Add New link to add a new Occupancy Notification.

Group Name

The Group Name field cannot be edited. To select another group, use the Cancel link to navigate to the previous screen.

Occupancy Status

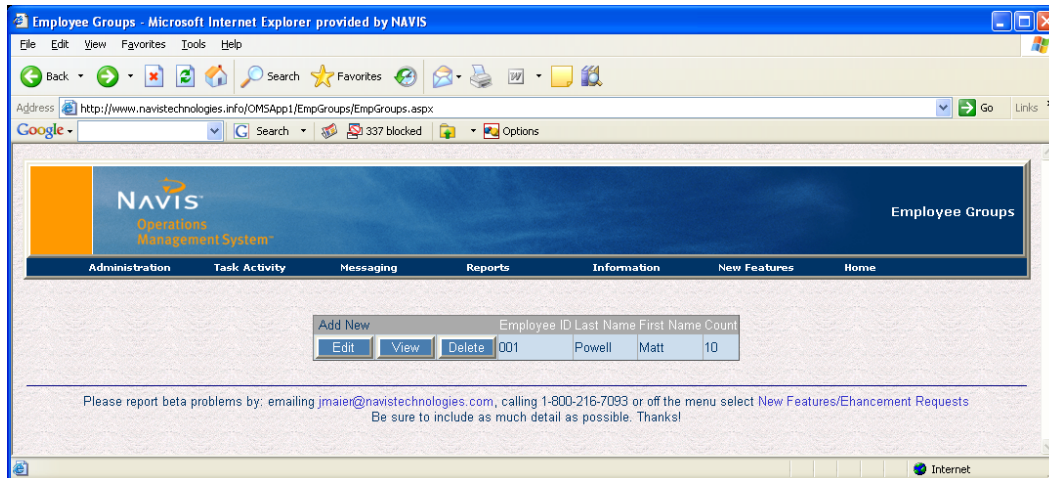
The Occupancy Status dropdown menu is used to select the status of occupancy that will trigger the notification.

Select

Use the Selection Boxes to select the desired destination for the notification. Check All and Clear All functions are also available.

Assign Scheduling

Assign Scheduling is used to create Employee Groups for faster day-to-day scheduling. If your employees work only in specific units or certain areas, this section will allow you to create a group for quicker and easier setup of the daily scheduled tasks.



Add New

Click the Add New link to open the “Group Employee Add” screen.



Select

Use the Selection Boxes in this column to choose an employee for this group.

Edit

The Edit tab will open a screen to allow you to add or remove units from the selected group.

View

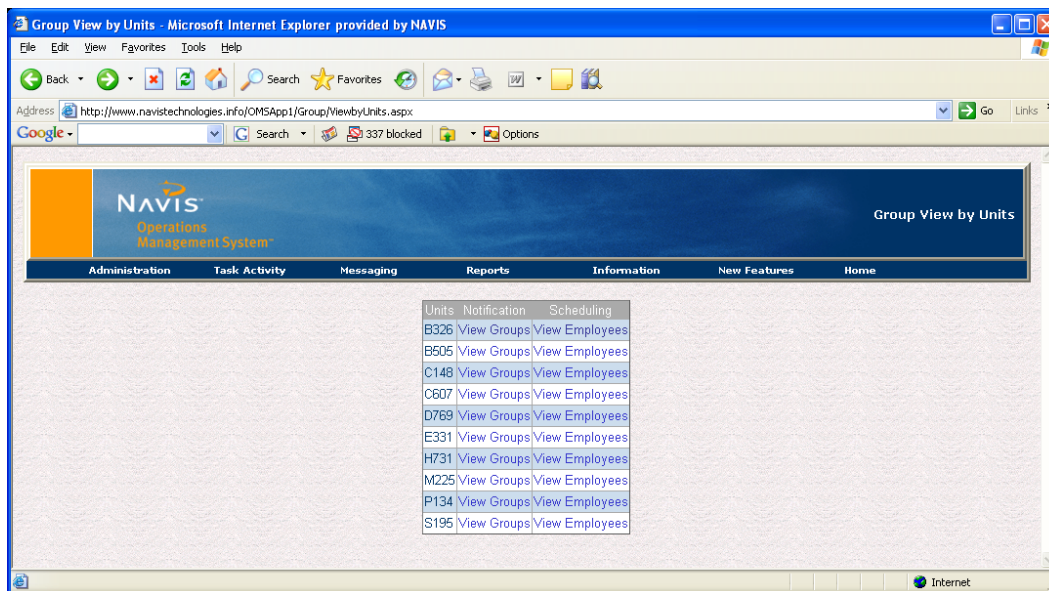
The View tab will display those units selected for each individual group.

Delete

The Delete function will completely remove an Employee Group.

View by Units

This screen displays all of the units in any group or employee group. You can select to view these by Group or Employee.



View Groups

The View Groups link displays all groups for a specific unit.

View Employees

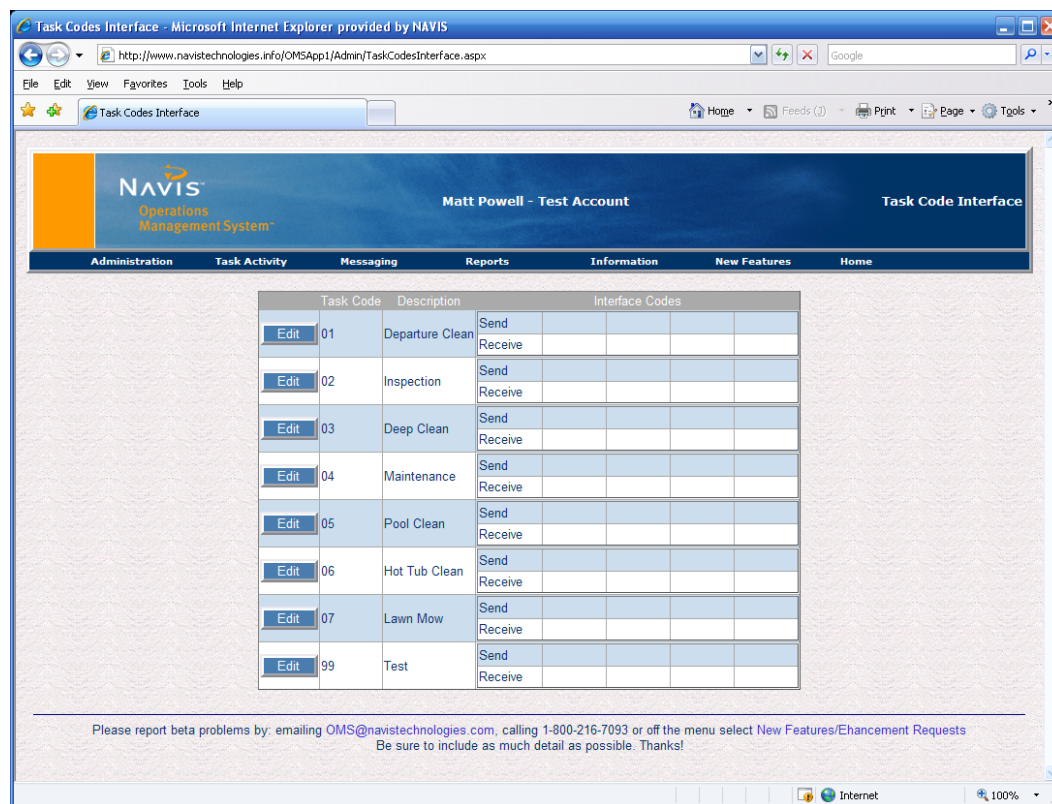
The View Employees link displays all Employee Groups that have been assigned to this specific unit for Scheduling.

Interface Configuration

This section of HMS is where you can add the Third Party Interface codes for communication between HMS and your Property Management Software. The types of information updated include changes in task status and occupancy, as well as employee info. These all vary depending on the Property Management Software currently in use.

Task Code Interface

This screen displays each task and its corresponding Third Party code for sending and receiving task status updates. (Please note: Tasks displayed here are the same as the tasks previously entered on the Task Code screen. Any changes made there will only affect the Interface codes added to this screen.)

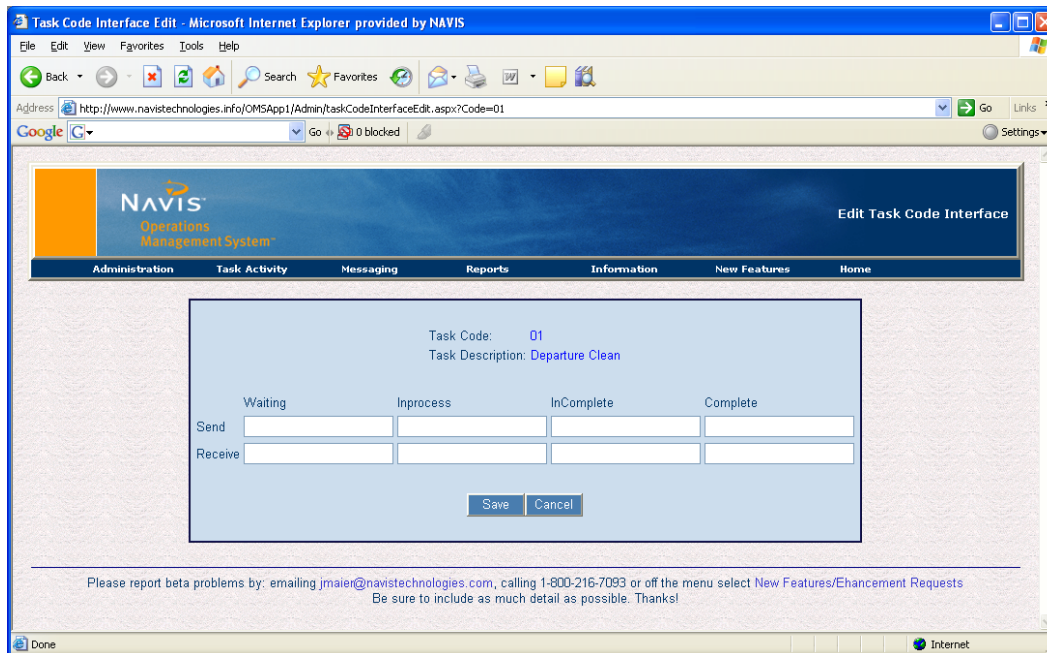


Task Code	Description	Interface Codes
Edit 01	Departure Clean	Send Receive
Edit 02	Inspection	Send Receive
Edit 03	Deep Clean	Send Receive
Edit 04	Maintenance	Send Receive
Edit 05	Pool Clean	Send Receive
Edit 06	Hot Tub Clean	Send Receive
Edit 07	Lawn Mow	Send Receive
Edit 99	Test	Send Receive

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Be sure to include as much detail as possible. Thanks!

Edit

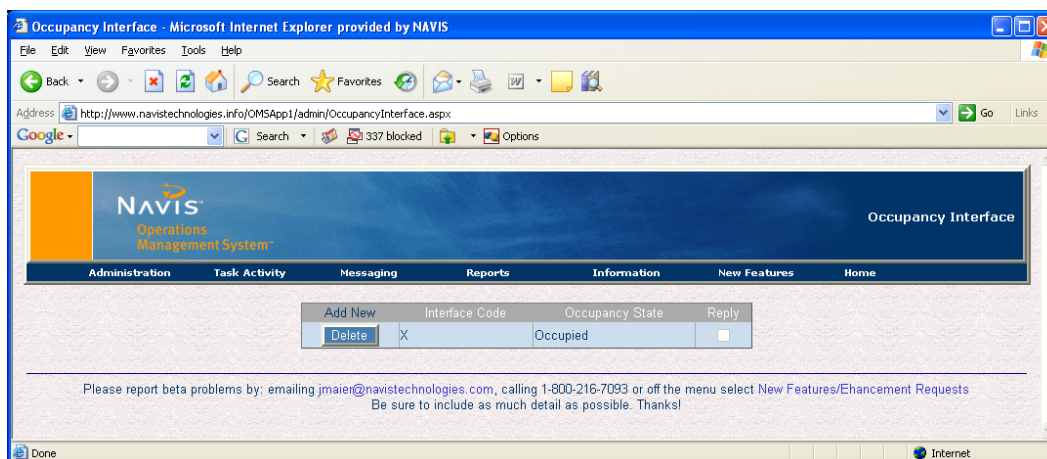
The Edit link will open up the task for adding and changing the Third Party codes.



The Edit Task Code Interface screen is used to enter each specific Third Party Code for a specific status. This is a cross reference for HMS which can be configured to send and receive data for all four states: Waiting, In-process, Incomplete, and Complete.

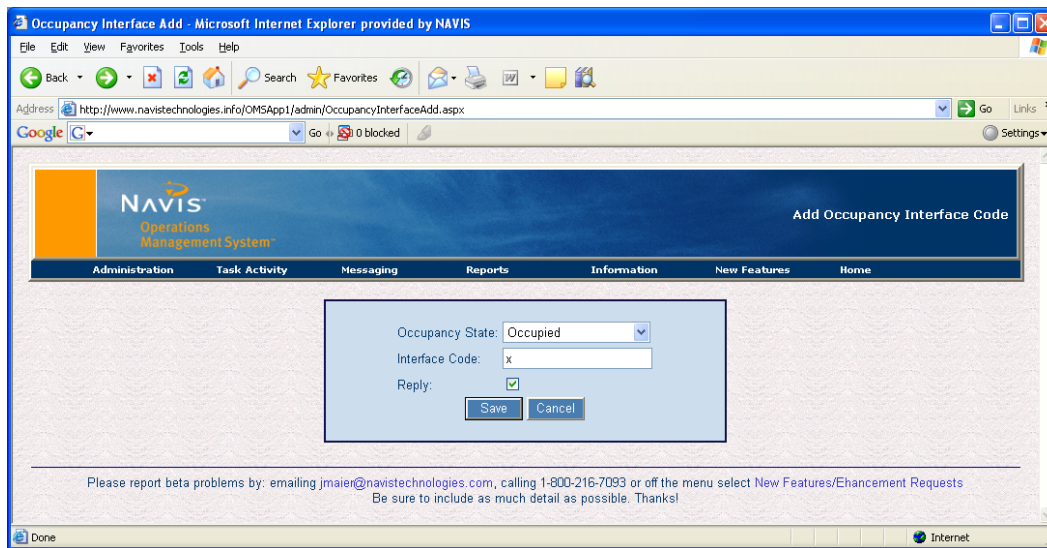
Occupancy Interface

Similar to Task Code Interface, this screen displays the Third Party Interface codes for changing the Occupancy Status of a unit.



Add New

Clicking on the Add New link allows you to add the Third Party Code which will update Occupancy status of each unit within HMS.



Occupancy State

Use the Occupancy State dropdown menu to select one of the 2 states of occupancy: Occupied or Vacant.

Interface Code

The Interface Code field is used to enter a specific code for the Occupancy State.

Reply

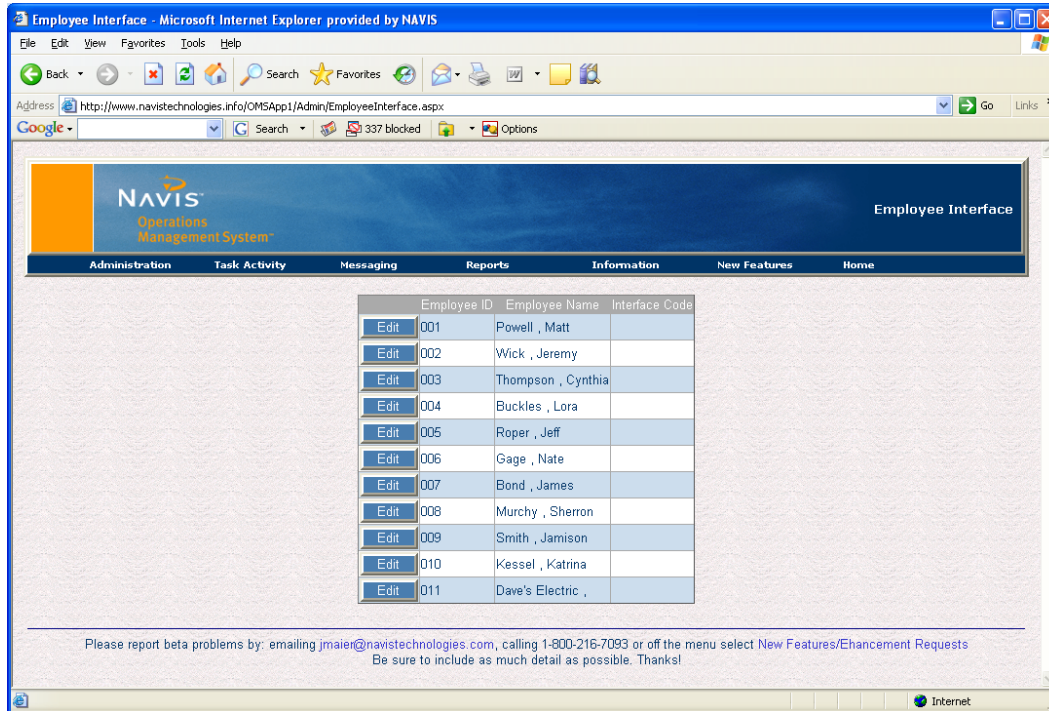
The Reply selection box on the proceeding screen should be checked if you would like to have HMS send the Occupancy Data back to the Property Management Software. (Only one reply per occupancy state can be sent.)

Delete

The Delete button will remove the Occupancy Interface code.

Employee Interface

This section of HMS is for adding Third Party Interface Codes to update an employee's information.



Edit

The Edit link will unlock the selected employee for editing.

Update

Click Update to save the Entered Code.

Cancel

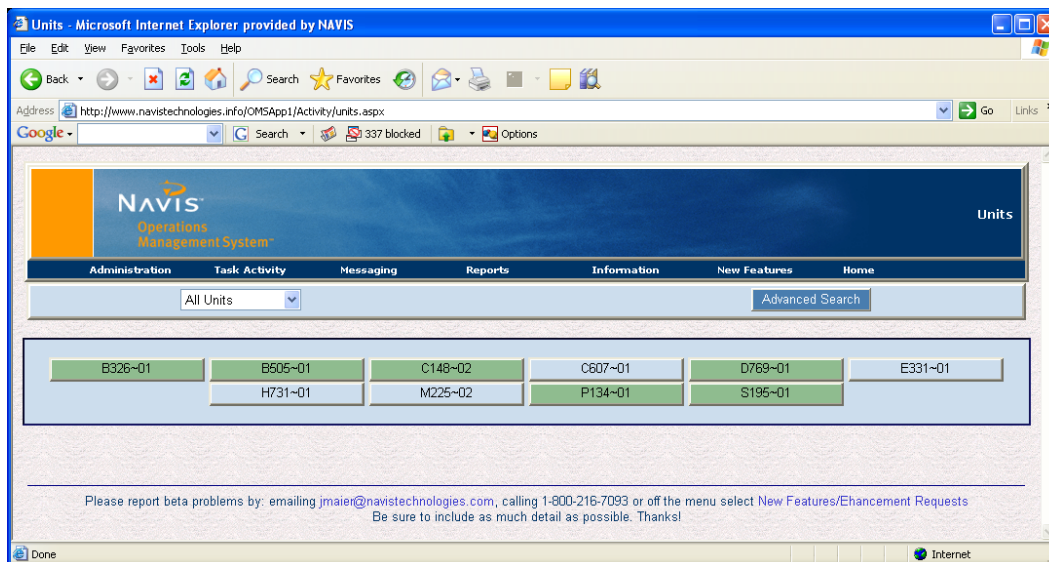
Click Cancel to cancel the edit action and remove any data entered.

Task Activity

The Task Activity section provides an effective interface for viewing the current status of all units, as well as the current and historical tasks related to these units. Included in this section is the functionality to create and schedule tasks, view and change unit occupancy, locate employees, and notify guests. A majority of day-to-day work is done from this section of HMS.

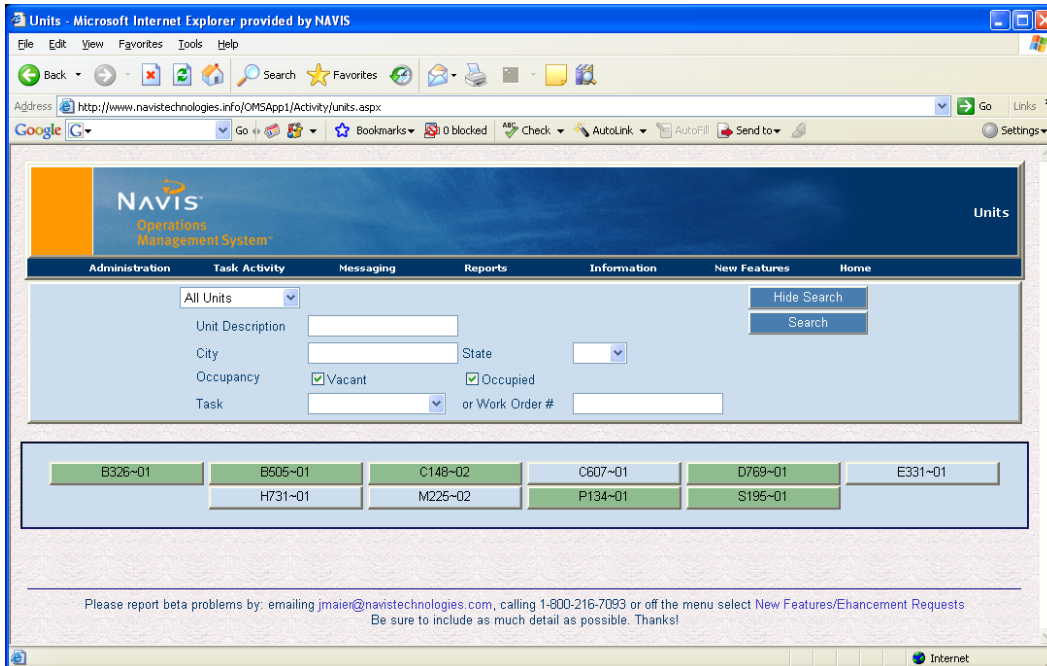
Unit Status

The HMS Units screen displays a clickable box for each unit and its corresponding Unit Description. The last posted task is displayed in each box preceded by the tilde symbol (~) and is color-coded to correspond with the status of that task. The text in each box is also color-coded to correspond with the occupancy of the unit. By holding your mouse pointer over one of the boxes, you will be able to view details of the last performed task, including: occupancy status, a description of the last task performed, the task status, and the date and time of last status update. If the Energy Sentinel service is also utilized, the current temperature, as well as the date and time of reporting, are displayed. This screen will refresh every 60 seconds and show any changes that have occurred.



Advanced Search

The Advanced Search link opens several search tools on the Units page, and includes a number of parameters that can be used to sort or “narrow-down” the units displayed on the screen.



Units - Microsoft Internet Explorer provided by NAVIS

Address: <http://www.navistechnologies.info/OMSApp1/Activity/units.aspx>

NAVIS Operations Management System

Units

Administration Task Activity Messaging Reports Information New Features Home

All Units

Unit Description

City State

Occupancy ☒ Vacant ☒ Occupied

Task or Work Order #

B326~01	B505~01	C148~02	C607~01	D769~01	E331~01
	H731~01	M225~02	P134~01	S195~01	

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All Units

The default on the dropdown box in the top corner of this page is All Units; this setting displays all units.

Open Task Units

When the dropdown box is set to Open Task Units, only units with an unfinished task will be displayed.

Unit Description

The Unit Description can contain a full or partial Unit Description. All units that contain the character string in this field will be displayed.

City-State

The City and State fields allow the selection of all units in a given city and/or State.

Occupancy

The Occupancy field allows the selection of units based on occupancy.

Task or Work Order Number

The Task or Work Order Number field enables the selection of units with the same open task.

Search

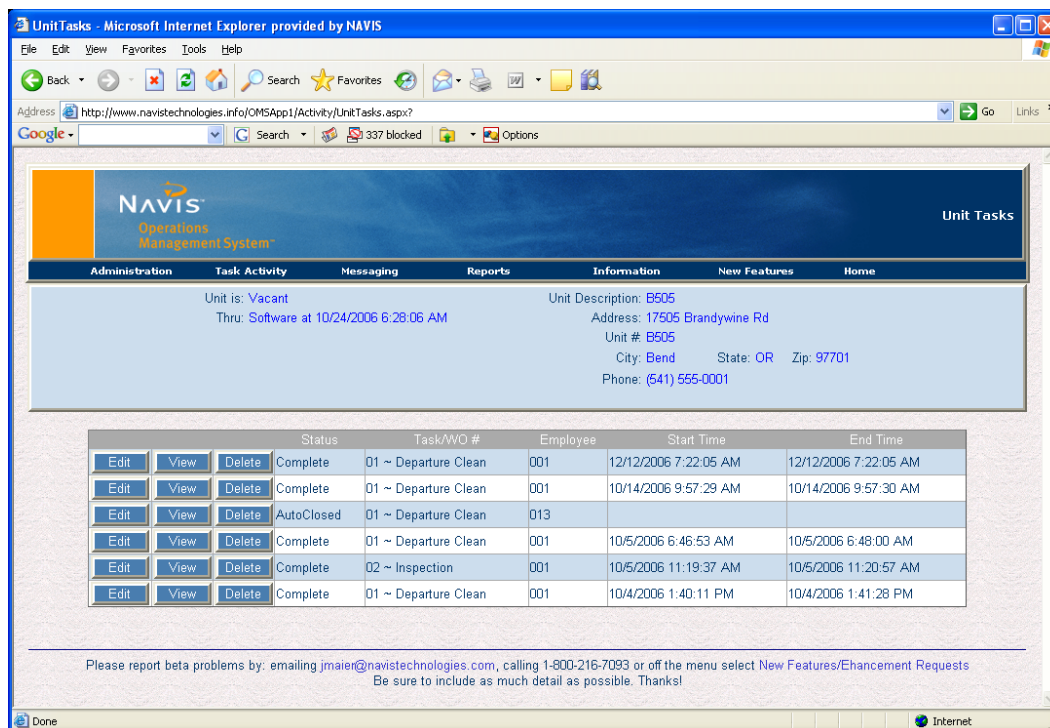
The Search button performs the specified search.

Hide Search

Hide search closes the Advanced Search tools, keeping any selection that was made using the search function. The search parameters will return upon the 60-second refresh.

Unit Detail

Clicking on any one of the Unit Buttons will display the Unit Detail page for the selected unit. This will show the Status, Task/Work Order number and description, Employee number, and the Start and End Time of each listed task. These are displayed by Date, starting with the most recently updated task.



Unit Tasks - Microsoft Internet Explorer provided by NAVIS

Address: <http://www.navistechnologies.info/OMSApp1/Activity/UnitTasks.aspx?>

Unit Tasks

Administration Task Activity Messaging Reports Information New Features Home

Unit is: Vacant
Thru: Software at 10/24/2006 6:28:06 AM

Unit Description: B505
Address: 17505 Brandywine Rd
Unit #: B505
City: Bend State: OR Zip: 97701
Phone: (541) 555-0001

	Status	Task/WO #	Employee	Start Time	End Time
Edit View Delete	Complete	01 ~ Departure Clean	001	12/12/2006 7:22:05 AM	12/12/2006 7:22:05 AM
Edit View Delete	Complete	01 ~ Departure Clean	001	10/14/2006 9:57:29 AM	10/14/2006 9:57:30 AM
Edit View Delete	AutoClosed	01 ~ Departure Clean	013		
Edit View Delete	Complete	01 ~ Departure Clean	001	10/5/2006 6:46:53 AM	10/5/2006 6:48:00 AM
Edit View Delete	Complete	02 ~ Inspection	001	10/5/2006 11:19:37 AM	10/5/2006 11:20:57 AM
Edit View Delete	Complete	01 ~ Departure Clean	001	10/4/2006 1:40:11 PM	10/4/2006 1:41:28 PM

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Be sure to include as much detail as possible. Thanks!

Edit

The Edit link opens up an existing task for editing. Typically, the only time a task needs to be edited is to close open tasks that were not closed properly by the employee performing the task in the unit.

Modify - Microsoft Internet Explorer provided by NAVIS

Address: <http://www.navistechnologies.info/OMSApp1/Activity/TaskModify.aspx?Mode=Edit>

NAVIS Operations Management System

Task/WO Modify

Administration Task Activity Messaging Reports Information New Features Home

Unit Description: B326 Task Code: 01 - Departure Clean

Created From: Schedule Status: 4- Complete

Creation Date: 12/12/2006 7:21:35 AM Employee: 001- Powell, Matt

Last Update From: OMS Web Start Date/Time: 12/12/2006 07:21 AM

Last Update Time: 12/12/2006 7:21:50 AM End Date/Time: 12/12/2006 07:21 AM

Amount: 40.00

Save Cancel

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Unit Description

The Unit Description indicates the unit for which the task was assigned.

Created From

The Created From field displays the source the task originated from.

Creation Date

The Creation Date field displays the date and time the task was created.

Last Updated From

The Last Updated From field displays the source the task was last updated from.

Last Updated Time

The Last Updated Time field displays the date and time the task was last updated.

Task Code

The Task Code field displays the task performed as well as its description.

Status

The Status field displays the current status of the posted task. Use the dropdown menu to change the current status of the task.

Employee

The Employee dropdown menu is used to change the employee who performed the task. A change to this field can be useful in situations where a new employee is assigned to a task originally assigned to a different employee, or if it was started by one employee and completed by another.

Start Date/Time

The Start Date/Time dropdown field can be adjusted.

End Date/Time

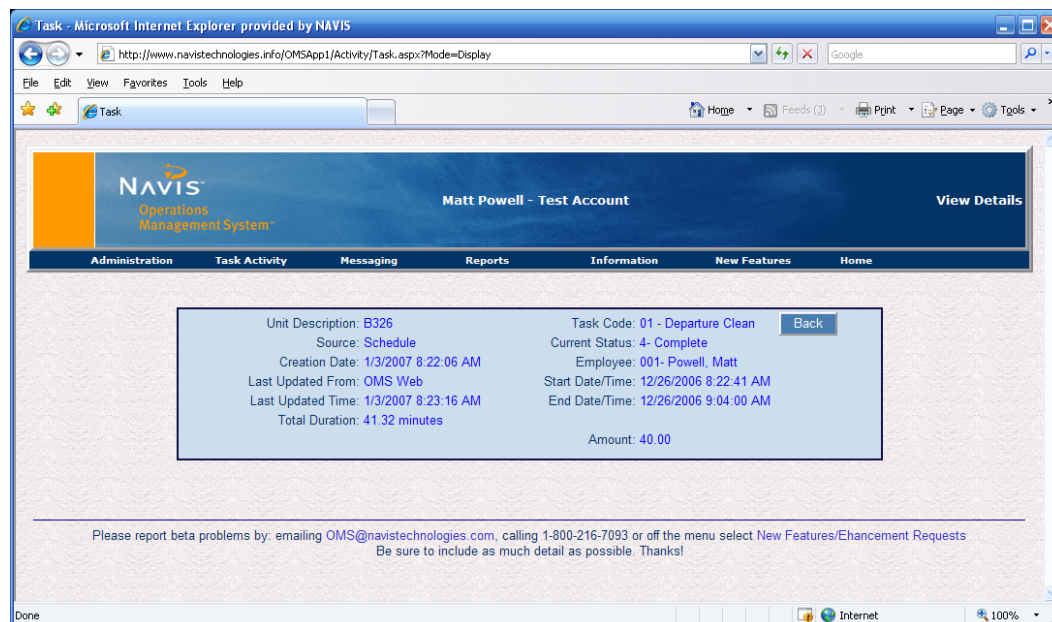
The End Date/Time dropdown field can be adjusted.

Amount

The amount field can be adjusted.

View

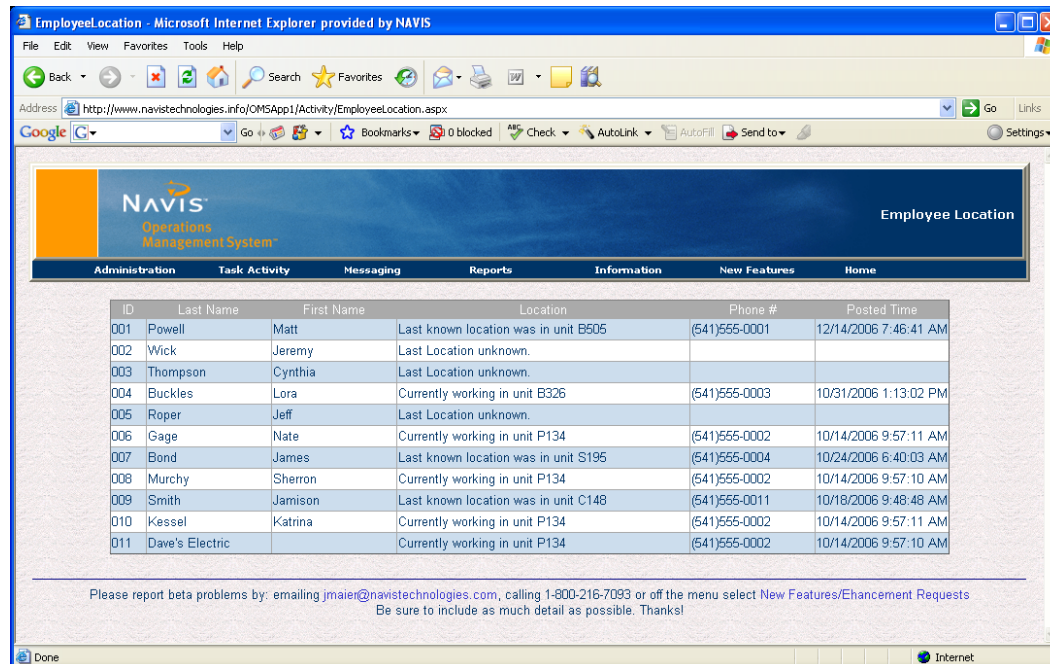
View shows all the specific details of the selected task.

**Delete**

Delete will remove the task and all its details from the Unit. (Note: deleted tasks will no longer be displayed on any subsequent screens or reports once removed.)

Employee Location

The Employee Location provides a list of all employees' current or last known location as logged by the HMS system. These are listed in chronological order from the newest to the oldest posting as a default setting. To re-sort this data, click on any one of the appropriate column headers.



ID	Last Name	First Name	Location	Phone #	Posted Time
001	Powell	Matt	Last known location was in unit B505	(541)555-0001	12/14/2006 7:46:41 AM
002	Wick	Jeremy	Last Location unknown.		
003	Thompson	Cynthia	Last Location unknown.		
004	Buckles	Lora	Currently working in unit B326	(541)555-0003	10/31/2006 1:13:02 PM
005	Roper	Jeff	Last Location unknown.		
006	Gage	Nate	Currently working in unit P134	(541)555-0002	10/14/2006 9:57:11 AM
007	Bond	James	Last known location was in unit S195	(541)555-0004	10/24/2006 6:40:03 AM
008	Murphy	Sherron	Currently working in unit P134	(541)555-0002	10/14/2006 9:57:10 AM
009	Smith	Jamison	Last known location was in unit C148	(541)555-0011	10/18/2006 9:48:48 AM
010	Kessel	Katrina	Currently working in unit P134	(541)555-0002	10/14/2006 9:57:11 AM
011	Dave's Electric		Currently working in unit P134	(541)555-0002	10/14/2006 9:57:10 AM

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Following is a brief description of the location statements shown on the Employee Location screen:

“Currently working...”

This states that the Employee is currently in the unit and performing the assigned task.

“Last known location was...”

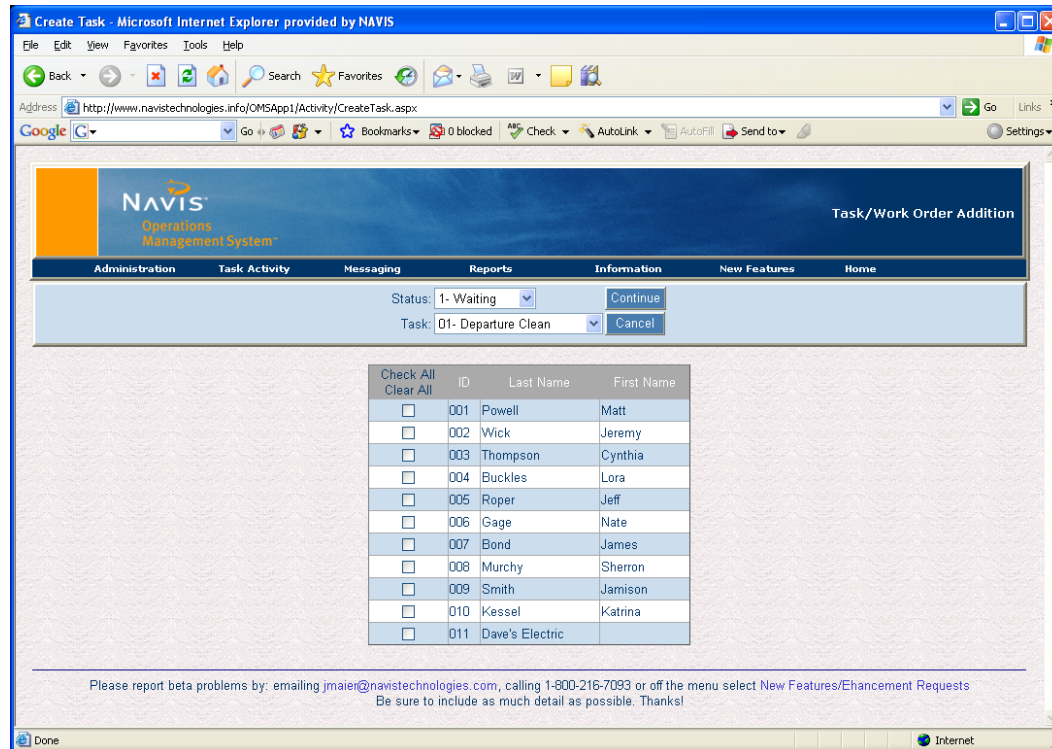
This states that the Employee was in this unit and has completed the assigned task.

“Last Location Unknown”

This statement is given for the instance when an Employee has not logged into or updated a task through HMS in the last 90 days.

Task/Work Order Creation

The Task/Work Order Creation page enables the creation of Tasks and Work Orders in the HMS system. These are immediately added to the Units screen.



Check All	Clear All	ID	Last Name	First Name
<input type="checkbox"/>	<input type="checkbox"/>	001	Powell	Matt
<input type="checkbox"/>	<input type="checkbox"/>	002	Wick	Jeremy
<input type="checkbox"/>	<input type="checkbox"/>	003	Thompson	Cynthia
<input type="checkbox"/>	<input type="checkbox"/>	004	Buckles	Lora
<input type="checkbox"/>	<input type="checkbox"/>	005	Roper	Jeff
<input type="checkbox"/>	<input type="checkbox"/>	006	Gage	Nate
<input type="checkbox"/>	<input type="checkbox"/>	007	Bond	James
<input type="checkbox"/>	<input type="checkbox"/>	008	Murphy	Sherron
<input type="checkbox"/>	<input type="checkbox"/>	009	Smith	Jamison
<input type="checkbox"/>	<input type="checkbox"/>	010	Kessel	Katrina
<input type="checkbox"/>	<input type="checkbox"/>	011	Dave's Electric	

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Be sure to include as much detail as possible. Thanks!

Status

The Status dropdown menu allows for the selection of the initial status of the task being created. The options for the status setting are: 1-Waiting, 2-In Process, 3-Incomplete, and 4-Complete. (Typically, a task would be created in a “waiting” status, unless the task you are creating has already begun.)

Task

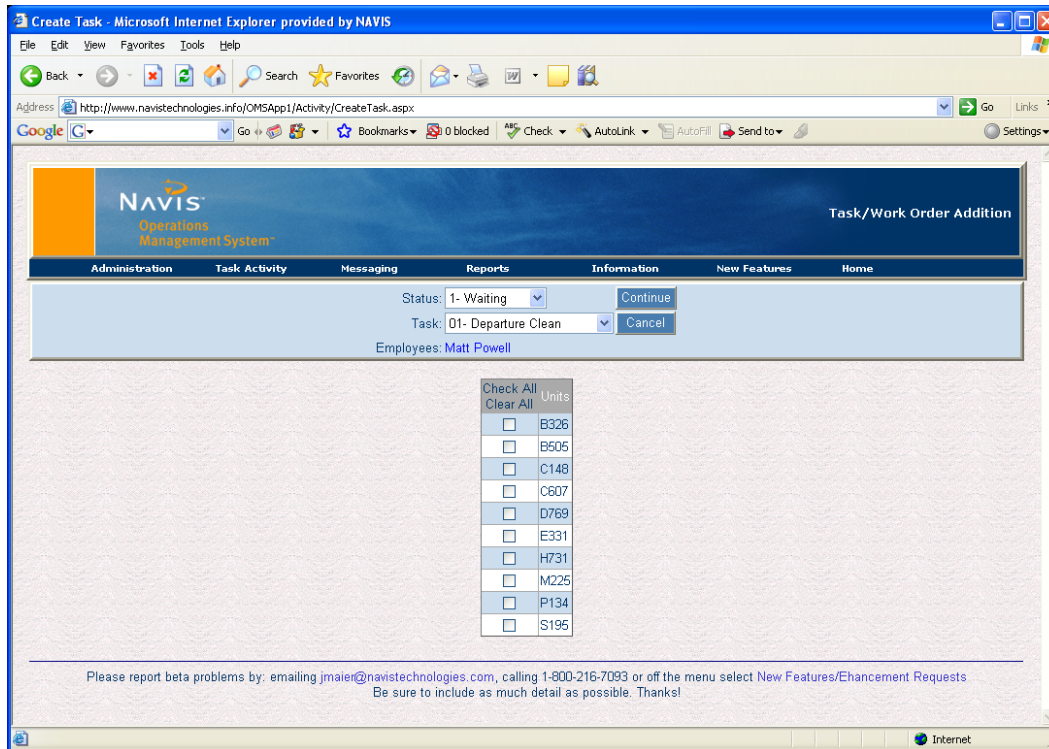
The Task dropdown menu allows for the selection of the task to be created. (New types of Tasks are created in the Administrative section.)

Employee

The Employee(s) assigned to the new task are chosen with the selection boxes. The Check All and Clear All functions are also available.

Continue

Click the Continue button to confirm the selection of Task, Status, and Employee or Employees for the new task. A second screen comes up to select the Unit(s) for which the task will be created.



Check All
Clear All

Check All	Units
<input type="checkbox"/>	B326
<input type="checkbox"/>	B505
<input type="checkbox"/>	C148
<input type="checkbox"/>	C607
<input type="checkbox"/>	D769
<input type="checkbox"/>	E331
<input type="checkbox"/>	H731
<input type="checkbox"/>	M225
<input type="checkbox"/>	P134
<input type="checkbox"/>	S195

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Select Unit(s)

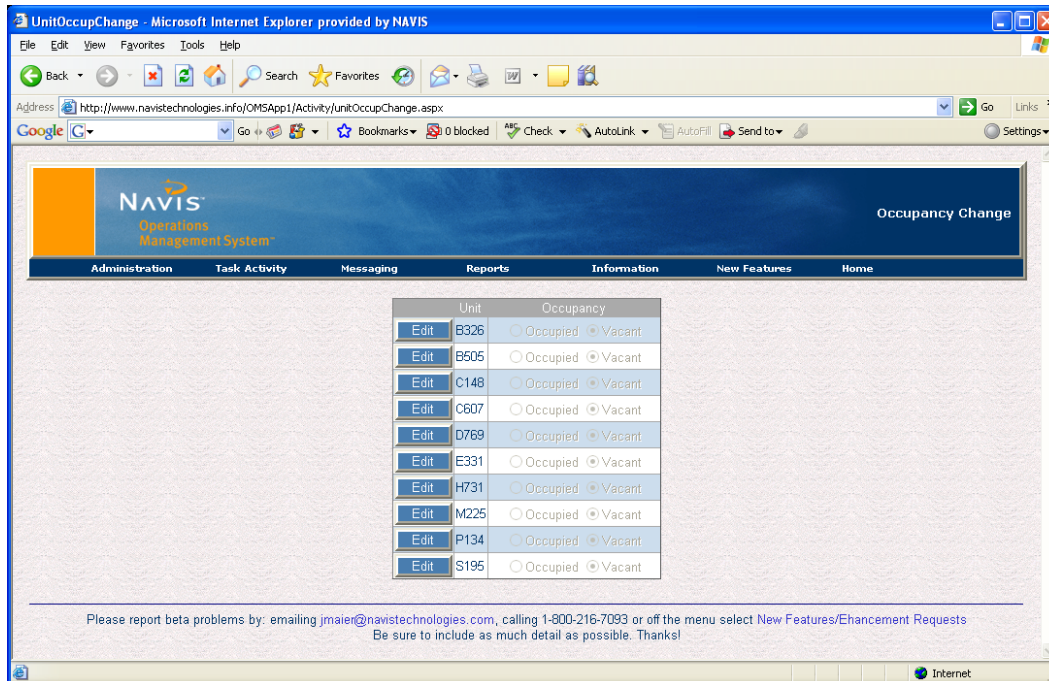
Use the selection boxes next to each Unit Description to choose which unit(s) the new task will be added to. As with the previous screen, the Check All and Clear All functions are available.

Continue

Click Continue to confirm your selections. This new task will now appear on the Units screen.

Change Unit Occupancy - Single

The Occupancy Change screen is used to change the occupancy status of a specific unit. Generally, the guest will use the access number to perform the “Change Unit Occupancy” functional. When a guest does not complete the check-in or check-out procedure, the Change Unit Occupancy feature can be used to set the appropriate status to a unit. In order to keep the Unit Status information accurate, it is recommended that units be updated once daily after the completion of all guest check-ins.



Edit

Clicking the Edit button will open the unit for changing the Occupancy status.

Change Unit Occupancy - Multiple

This screen functions exactly as the previous screen, only it will allow for multiple occupancy changes rather than single. The current Occupancy State is displayed on this screen in red and will stay red until saved. This will help you know what the status was when you entered this screen. Simply use the radio selection buttons to choose those units you wish to change and click on Save.

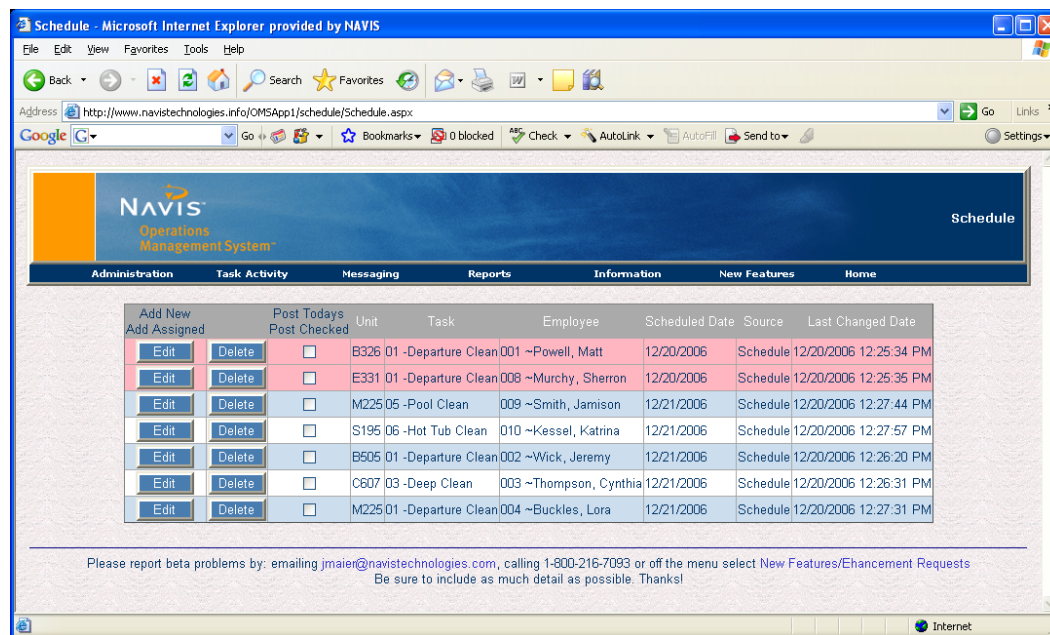
Unit	Occupancy
B326	<input type="radio"/> Occupied <input checked="" type="radio"/> Vacant
B605	<input type="radio"/> Occupied <input checked="" type="radio"/> Vacant
C148	<input type="radio"/> Occupied <input checked="" type="radio"/> Vacant
C607	<input type="radio"/> Occupied <input checked="" type="radio"/> Vacant
D769	<input type="radio"/> Occupied <input checked="" type="radio"/> Vacant
E331	<input type="radio"/> Occupied <input checked="" type="radio"/> Vacant
H731	<input type="radio"/> Occupied <input checked="" type="radio"/> Vacant
M225	<input type="radio"/> Occupied <input checked="" type="radio"/> Vacant
P134	<input type="radio"/> Occupied <input checked="" type="radio"/> Vacant
S195	<input type="radio"/> Occupied <input checked="" type="radio"/> Vacant

Please report beta problems by: emailing jmaier@navistechnologies.com, calling 1-800-216-7093 or off the menu select New Features/Enhancement Requests
Be sure to include as much detail as possible. Thanks!

Schedule Tasks/Work Orders

The Schedule Tasks/Work Orders screen is the where tasks can be scheduled for future dates. All scheduled tasks are displayed on this screen. Any tasks scheduled with the current date or past date are displayed on the table with a pink background. The tasks with future dates are displayed in a blue and white alternating background.

The Schedule Task feature enables anyone doing scheduling to save time and create known future tasks in advance. This simplifies the daily procedure to consist of a single-click on the Post Todays link.

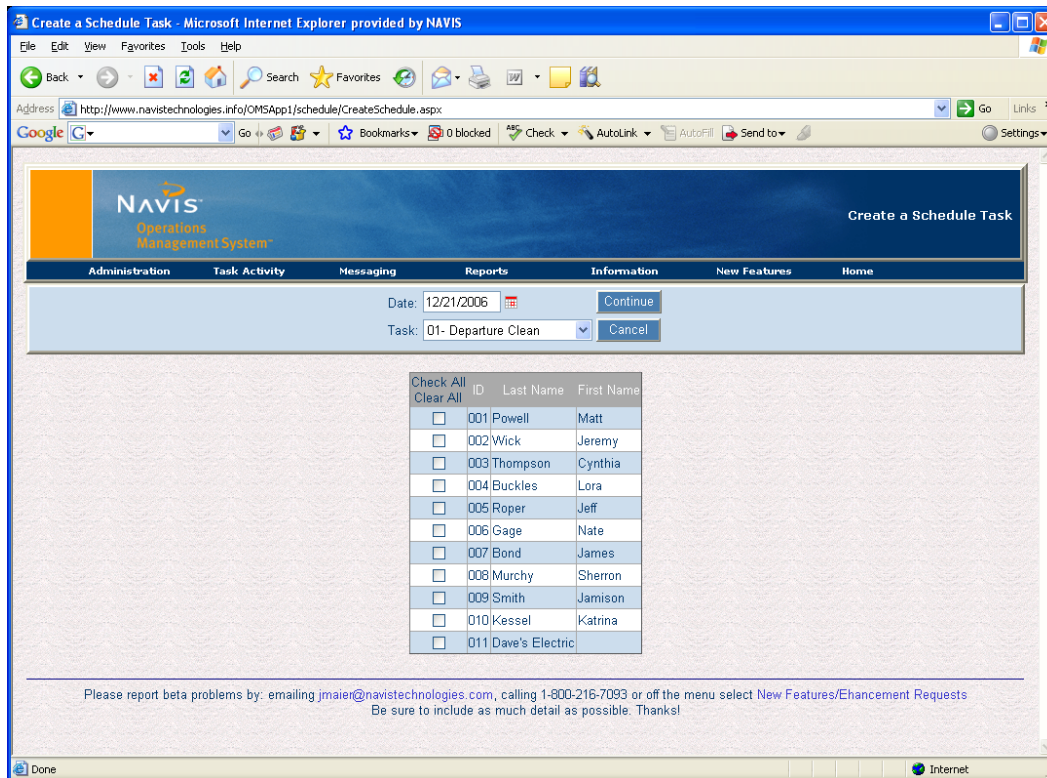


Add New	Add Assigned	Post Todays	Post Checked	Unit	Task	Employee	Scheduled Date	Source	Last Changed Date
Edit	Delete	<input type="checkbox"/>	<input type="checkbox"/>	B326 01	-Departure Clean	001 ~Powell, Matt	12/20/2006	Schedule	12/20/2006 12:25:34 PM
Edit	Delete	<input type="checkbox"/>	<input type="checkbox"/>	E331 01	-Departure Clean	008 ~Murchy, Sherron	12/20/2006	Schedule	12/20/2006 12:25:35 PM
Edit	Delete	<input type="checkbox"/>	<input type="checkbox"/>	M225 05	-Pool Clean	009 ~Smith, Jamison	12/21/2006	Schedule	12/20/2006 12:27:44 PM
Edit	Delete	<input type="checkbox"/>	<input type="checkbox"/>	S195 06	-Hot Tub Clean	010 ~Kessel, Katrina	12/21/2006	Schedule	12/20/2006 12:27:57 PM
Edit	Delete	<input type="checkbox"/>	<input type="checkbox"/>	B505 01	-Departure Clean	002 ~Wick, Jeremy	12/21/2006	Schedule	12/20/2006 12:26:20 PM
Edit	Delete	<input type="checkbox"/>	<input type="checkbox"/>	C607 03	-Deep Clean	003 ~Thompson, Cynthia	12/21/2006	Schedule	12/20/2006 12:26:31 PM
Edit	Delete	<input type="checkbox"/>	<input type="checkbox"/>	M225 01	-Departure Clean	004 ~Buckles, Lora	12/21/2006	Schedule	12/20/2006 12:27:31 PM

Please report beta problems by: emailing jmaier@navistechnologies.com, calling 1-800-216-7093 or off the menu select New Features/Enhancement Requests
Be sure to include as much detail as possible. Thanks!

Add New

The Add New link moves to the Create a Schedule Task screen where new tasks can be scheduled.



NAVIS Operations Management System

Create a Schedule Task

Administration Task Activity Messaging Reports Information New Features Home

Date: 12/21/2006

Task: D1- Departure Clean

Check All	ID	Last Name	First Name
<input type="checkbox"/>	001	Powell	Matt
<input type="checkbox"/>	002	Wick	Jeremy
<input type="checkbox"/>	003	Thompson	Cynthia
<input type="checkbox"/>	004	Buckles	Lora
<input type="checkbox"/>	005	Roper	Jeff
<input type="checkbox"/>	006	Gage	Nate
<input type="checkbox"/>	007	Bond	James
<input type="checkbox"/>	008	Murphy	Sherron
<input type="checkbox"/>	009	Smith	Jamison
<input type="checkbox"/>	010	Kessel	Katrina
<input type="checkbox"/>	011	Dave's Electric	

Please report beta problems by: emailing jmaier@navistechnologies.com, calling 1-800-216-7093 or off the menu select [New Features/Enhancement Requests](#). Be sure to include as much detail as possible. Thanks!

Date

The Date calendar allows the selection of a date on which the new task will be scheduled.

Task

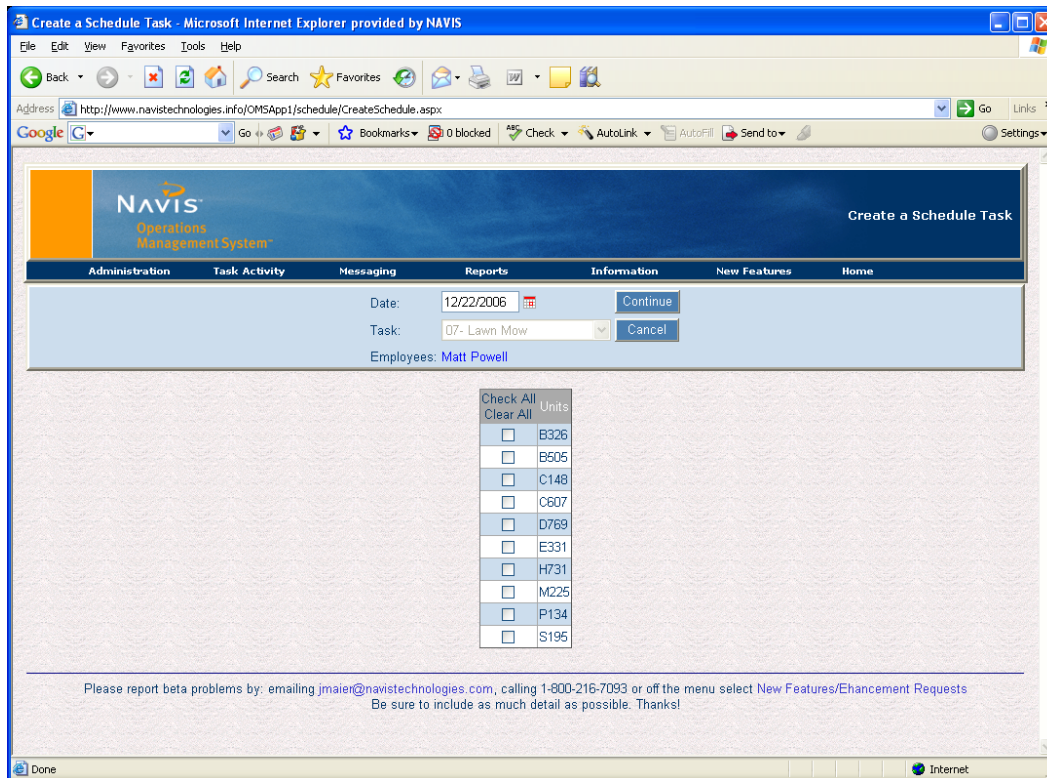
The Task dropdown menu provides a list of tasks to be scheduled.

Employee

Use the selection boxes to choose an employee to perform the new task. There are the Check All and Clear All links to use as well.

Continue

The Continue button will confirm the task, date, and employee for creation of the new scheduled task. The following screen is where you will enter the unit(s) in which a scheduled task is assigned.



Select Unit

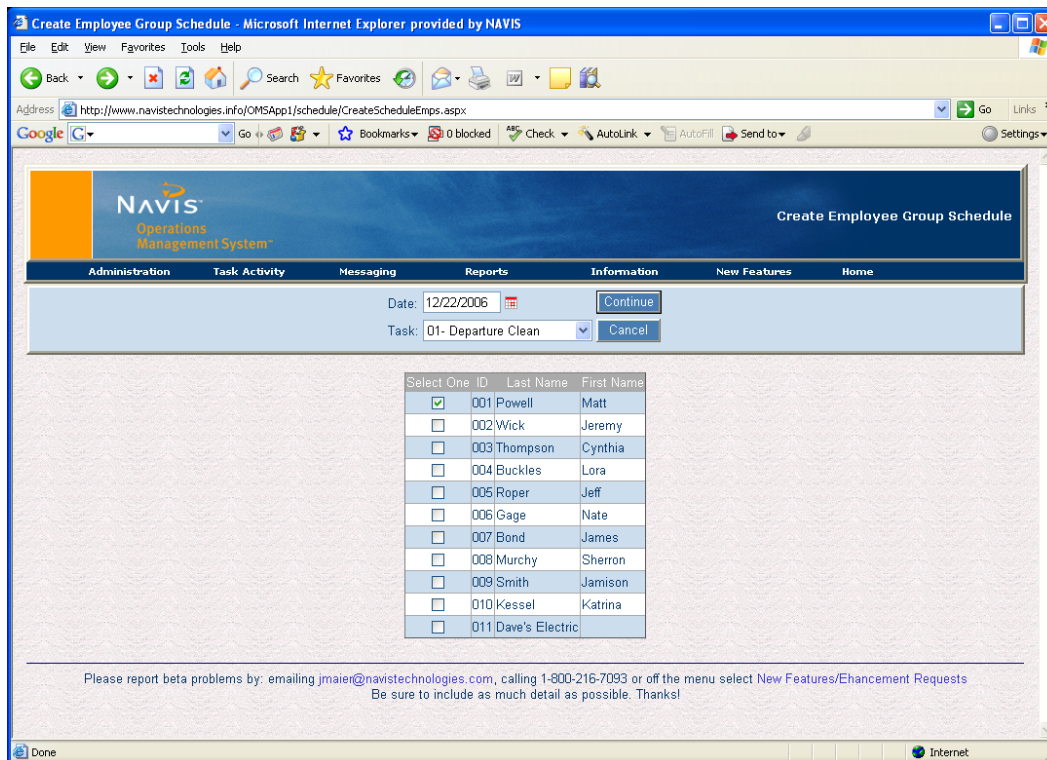
Use the unit selection boxes next to the unit to pick which unit will be assigned this scheduled task. The Check All and Clear All links are also available to use.

Continue

The Continue button will now confirm the creation of the new scheduled task and add it to the Schedule screen.

Add Assigned

The Add Assigned link moves to the Create Employee Group Schedule screen, where new tasks can be scheduled by unit for an Employee Group.



Select One	ID	Last Name	First Name
<input checked="" type="checkbox"/>	001	Powell	Matt
<input type="checkbox"/>	002	Wick	Jeremy
<input type="checkbox"/>	003	Thompson	Cynthia
<input type="checkbox"/>	004	Buckles	Lora
<input type="checkbox"/>	005	Roper	Jeff
<input type="checkbox"/>	006	Gage	Nate
<input type="checkbox"/>	007	Bond	James
<input type="checkbox"/>	008	Murchy	Sherron
<input type="checkbox"/>	009	Smith	Jamison
<input type="checkbox"/>	010	Kessel	Katrina
<input type="checkbox"/>	011	Dave's Electric	

Please report beta problems by: emailing jmaier@navistechnologies.com, calling 1-800-216-7093 or off the menu select [New Features/Enhancement Requests](#). Be sure to include as much detail as possible. Thanks!

Similar to the Create a Schedule Task screen in functionality, make selections using the appropriate parameters. For each Employee Group created, only the units assigned to each specified group will show up as selectable items in the selection boxes.

If no unit groups have been created for the employee, all units will be displayed. If you have an employee who will be working in a unit outside of his/her normal “employee group”, a single task will need to be created for this instance.

Edit

The Edit button allows the modification of any currently scheduled tasks. The Task Code and the Unit Description cannot be edited.

The screenshot shows a web browser window titled "Edit Schedule - Microsoft Internet Explorer provided by NAVIS". The address bar shows the URL "http://www.navistechnologies.info/OMSApp1/schedule/ScheduleEdit.aspx". The page features a NAVIS logo and a navigation menu with links: Administration, Task Activity, Messaging, Reports, Information, New Features, and Home. The main content area displays a form for editing a scheduled task. The form fields are as follows:

Unit Description:	B326
Task Code:	01-Departure Clean
Source:	Schedule
Employee:	001- Powell, Matt
Scheduled Date:	12/20/2006
Last Changed Date:	12/20/2006 12:25:34 PM

At the bottom of the form are "Save" and "Cancel" buttons. Below the form, a footer message reads: "Please report beta problems by: emailing jmaier@navistechnologies.com, calling 1-800-216-7093 or off the menu select New Features/Enhancement Requests. Be sure to include as much detail as possible. Thanks!"

Employee

Use the Employee dropdown menu to change the existing employee set to perform this scheduled task.

Scheduled Date

Use the Scheduled Date dropdown menu to select a new date for the scheduled task.

Save

Clicking Save will confirm the changes made.

Post Todays

The Post Todays link adds all scheduled tasks with the corresponding date to the Unit Status screen.

Post Checked

The Post Checked link adds all selected scheduled tasks to the Unit Status screen.

Delete

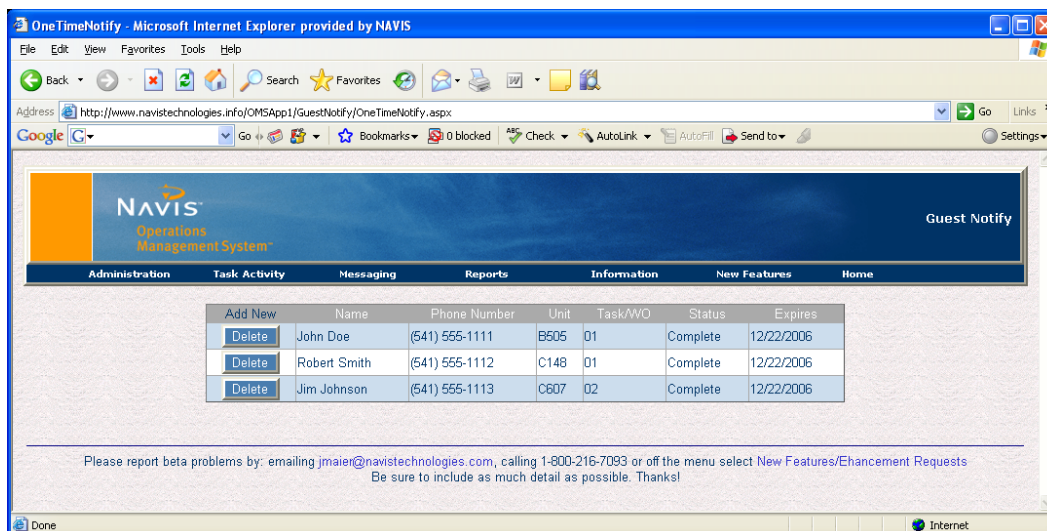
The Delete link will remove the scheduled task from the Schedule screen, and will no longer appear on any subsequent reports.

Guest Notify

The Guest Notify menu items provide the ability to contact a guest upon the completion of a task. This feature is commonly used to notify a guest who has requested an early check-in. The “notification” is accomplished by scheduling an automated message to be delivered when a housekeeper or inspector calls into the HMS system to log a change in the current status of a specific task.

Guest Notify - List

The List screen displays all of the Notifications created. The list can be sorted by clicking on the column headers.



Add New

The Add New link loads the Guest Notify Addition screen.

Guest Name

Enter the name of the Guest.

Guest Phone Number

Enter the destination number the guest would like to receive notification on.

Receiving Type

From this dropdown menu, select the message delivery type.

Unit Description

Select the appropriate unit the guests will be checking into, from the dropdown menu. (If you have navigated to Guest Notify from the Unit Detail screen, this field will auto-populate with the appropriate unit description.)

Task Code/Work Order

Choose the task code or work order from the dropdown menu that will trigger the notification.

Status

Choose the status of the above task or work order from the dropdown menu to trigger the notification.

Message

Use the text block here to type the message you wish to deliver to the guest. The text-to-speech engine converts the typed message to a voice, email, or text message. The default message is set to, “Your vacation rental is now ready for occupancy”.

Expire Date

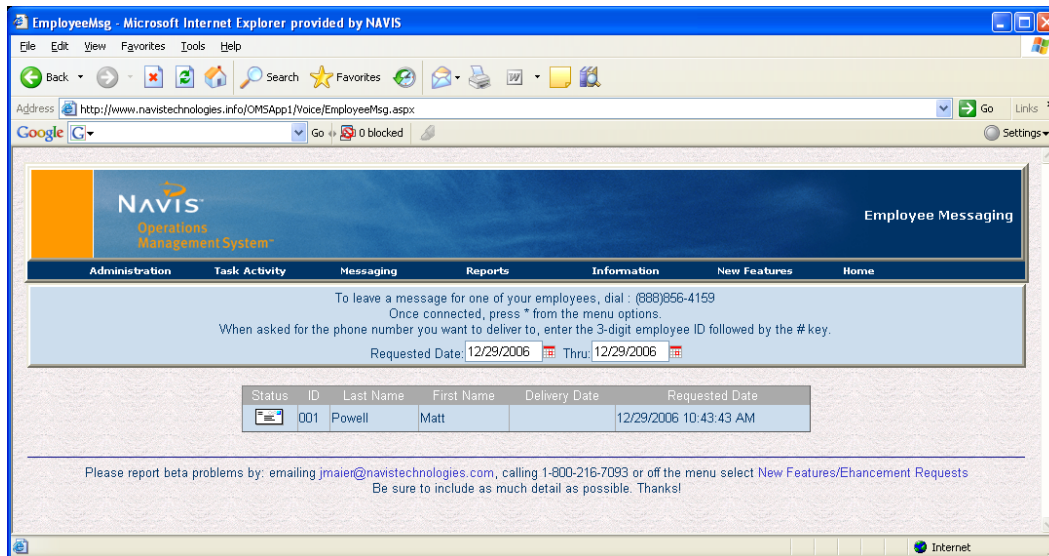
The Expire Date is used to select a future date for this notification to automatically terminate. This is useful if the housekeeper or inspector fails to update the specific task with the status selected as a trigger for the notification. It will also prevent future delivery of the same message later on, when that same task status is logged into the HMS system from the same unit at a later date.

Guest Notify - Add

The Add menu goes right to the Guest Notify Addition screen. All the same options as above apply. You can then view these from the **Guest Notify – List** screen. This Menu item was moved from the Unit Detail screen. If you select “Guest Notify – Add” from the Unit Detail screen, you will be redirected to the Guest Notify Addition Screen with the appropriate Unit Description automatically filled in.

Messaging

The messaging feature enables the scheduling of prerecorded messages to be delivered to an employee when he/she logs into the system. When an employee has a pending message in the system, the next time they log into HMS, they will automatically receive their message after entering the appropriate task status update.



How to record the Message

The text at the top of the screen displays the instructions for creating an employee message:

“To leave a message for one of your employees, dial; (your toll-free, Guest Connections Number). Once connected, press * from the menu options. When asked for the phone number you want to deliver to, enter the 3-digit employee ID followed by the # key.”

Requested Date - Thru

The Requested Date Range indicates the time period for the messages displayed.

Status


- For a pending message, the status is shown as an Envelope Icon.
- For a delivered message, the status is shown as a Mailbox. The delivery date and time are also be displayed in the appropriate column.

Reports

The reporting section of HMS provides some of the most valuable features in the system. All reports can be created in either Excel (XLS) or Adobe Acrobat (PDF).

Task Report

The task report will show, over a given date range, who has performed a specified task, which unit they did the work in, how long it took them, the current status of the task, and, if applicable, the amount of money to be paid on that task.


 Task Report for 12/29/2006 thru 12/29/2006						
Task	Employee	Unit	Start Date	EndDate	Status	Amount
21 Full Close		FLT02	12/29/2006 3:22:32 PM	12/29/2006 3:22:32 PM	4- Complete	0.00
21 Full Close		LRK02	12/29/2006 3:09:44 PM	12/29/2006 3:09:44 PM	4- Complete	0.00
21 Full Close		FVC06	12/29/2006 2:29:04 PM	12/29/2006 2:29:04 PM	4- Complete	0.00
21 Full Close		RGR17	12/29/2006 2:07:30 PM	12/29/2006 2:07:30 PM	4- Complete	0.00
21 Full Close		TPF19	12/29/2006 1:52:36 PM	12/29/2006 1:52:36 PM	4- Complete	0.00
21 Full Close		TIM11	12/29/2006 1:33:06 PM	12/29/2006 1:33:06 PM	4- Complete	0.00
21 Full Close		VRL14	12/29/2006 1:16:04 PM	12/29/2006 1:16:04 PM	4- Complete	0.00
21 Full Close		ALT02	12/29/2006 1:06:47 PM	12/29/2006 1:06:47 PM	4- Complete	0.00
21 Full Close		ASP15	12/29/2006 1:02:27 PM	12/29/2006 1:02:27 PM	4- Complete	0.00
21 Full Close		HAR10	12/29/2006 12:50:43 PM	12/29/2006 12:50:43 PM	4- Complete	0.00
21 Full Close		TPF07	12/29/2006 11:55:23 AM	12/29/2006 11:55:23 AM	4- Complete	0.00
21 Full Close		PRD04	12/29/2006 11:42:07 AM	12/29/2006 11:42:07 AM	4- Complete	0.00
21 Full Close		BGR04	12/29/2006 11:13:49 AM	12/29/2006 11:13:49 AM	4- Complete	0.00
21 Full Close		GRO04	12/29/2006 11:06:55 AM	12/29/2006 11:06:55 AM	4- Complete	0.00
21 Full Close		LRK12	12/29/2006 10:49:10 AM	12/29/2006 10:49:10 AM	4- Complete	0.00
21 Full Close		YEL26	12/29/2006 10:48:23 AM	12/29/2006 10:48:23 AM	4- Complete	0.00
21 Full Close		CAM01	12/29/2006 10:40:41 AM	12/29/2006 10:40:41 AM	4- Complete	0.00
21 Full Close		MTH07	12/29/2006 10:28:32 AM	12/29/2006 10:28:32 AM	4- Complete	0.00
21 Full Close		BAL04	12/29/2006 10:21:10 AM	12/29/2006 10:21:10 AM	4- Complete	0.00
21 Full Close		WIC12	12/29/2006 10:12:22 AM	12/29/2006 10:12:22 AM	4- Complete	0.00
21 Full Close		PRD05	12/29/2006 9:55:10 AM	12/29/2006 9:55:10 AM	4- Complete	0.00

Parameters

- Date Range
- Appear on separate pages
- Include Waiting Tasks
- Select Task Code(s)

Unit Report

The Unit report provides a detailed breakdown of all tasks performed on a unit. The detail sorted by unit includes: completed tasks, employees performing the task, and the amount paid.


 Unit Report for 12/29/2006 thru 12/29/2006						
Unit	Employee	Task	Start Date	EndDate	Status	Amount
ALT02		11 Inspection	12/29/2006 4:04:02 PM	12/29/2006 4:07:52 PM	4- Complete	0.00
ALT02		02 Full Clean	12/29/2006 2:08:21 PM	12/29/2006 4:02:17 PM	4- Complete	27.00
ALT02		21 Full Close	12/29/2006 1:06:47 PM	12/29/2006 1:06:47 PM	4- Complete	0.00
ASP15		11 Inspection	12/29/2006 3:53:41 PM	12/29/2006 15:57	4- Complete	0.00
ASP15		02 Full Clean	12/29/2006 11:03:07 AM	12/29/2006 12:22:56 PM	4- Complete	27.00
ASP15		21 Full Close	12/29/2006 1:02:27 PM	12/29/2006 1:02:27 PM	4- Complete	0.00
BAL03		11 Inspection	12/29/2006 1:26:29 PM	12/29/2006 1:42:50 PM	4- Complete	0.00
BAL03		02 Full Clean	12/29/2006 12:06:08 PM	12/29/2006 12:06:08 PM	4- Complete	32.40
BAL04		11 Inspection	12/29/2006 11:20:36 AM	12/29/2006 11:30:28 AM	4- Complete	0.00
BAL04		02 Full Clean	12/29/2006 9:47:30 AM	12/29/2006 11:24:04 AM	4- Complete	37.80

Parameters

- Date Range
- Appear on separate pages
- Include Waiting Tasks
- Include Work Orders
- Select Task Code(s)

Unit Notes Report

The Unit Notes report provides a summary of all special instructions or notes associated with each unit.


 Unit Notes		
Unit	Note	Date
AHC10	Laundry: This unit has two Queen beds with extra thick mattresses. The owner has requested that we use King sheets so the mattresses do not buckle. All the beds use standard pillow cases.	8/10/2006 2:57:38 PM
	MAINT: For maintenance issues related to the condo management association contact XXX or XXX at (541)598-XXXX.	8/10/2006 2:48:47 PM
	HSK: The white rug goes under the living room coffee table.	
ALT02	All departments: The owners are frequent guests in this unit. If there are condiments in the refrigerator leave them there.	8/10/2006 3:06:38 PM
	MAINT: Owner does most of the maintenance in this unit. We do not clean the carpets unless owner requests it cleaned.	8/10/2006 3:03:33 PM
ANT09	Laundry bi-fold doors come off the track often.	8/10/2006 3:18:01 PM
	Do not stack or leave wood next to woodstove or on the floor.	
	Please report laundry room doors if they are off track.	
	Owner requests 6 extra bath towels.	
ANT18	Make sure the gas fireplace pilot light is on.	8/11/2006 1:48:36 PM

Parameters

- Select Unit(s)

Employee Report

The Employee Report details all actions performed on the selected units by selected employees for a specified date range. It is sorted by employee, and provides a summary of the total value of the tasks an employee has completed.

 Employee Report for 12/29/2006 thru 12/29/2006						
Employee	Task	Unit	Start Date	EndDate	Status	Amount
	02- Full Clean	FLT02	12/29/2006 3:05:44 PM	12/29/2006 4:03:57 PM	4- Complete	21.60
	02- Full Clean	ASP15	12/29/2006 11:03:07 AM	12/29/2006 12:22:56 PM	4- Complete	27.00
	02- Full Clean	BGR04	12/29/2006 12:52:01 PM	12/29/2006 2:53:13 PM	4- Complete	50.60
	02- Full Clean	QLN15	12/29/2006 9:21:26 AM	12/29/2006 10:50:53 AM	4- Complete	41.80
	02- Full Clean	ALT02	12/29/2006 2:08:21 PM	12/29/2006 4:02:17 PM	4- Complete	27.00
	02- Full Clean	TVC04	12/29/2006 10:43:28 AM	12/29/2006 1:51:12 PM	4- Complete	21.60
	11- Inspection	PRD04	12/29/2006 4:27:34 PM	12/29/2006 4:27:34 PM	4- Complete	0.00
	11- Inspection	PRD05	12/29/2006 4:22:06 PM	12/29/2006 4:22:06 PM	4- Complete	0.00
	11- Inspection	PVCH4	12/29/2006 3:40:40 PM	12/29/2006 3:40:40 PM	4- Complete	0.00
	11- Inspection	BGL11	12/29/2006 12:54:05 PM	12/29/2006 1:03:03 PM	4- Complete	0.00
	11- Inspection	LRK12	12/29/2006 12:24:12 PM	12/29/2006 12:43:43 PM	4- Complete	0.00
	02- Full Clean	CAM01	12/29/2006 2:29:48 PM	12/29/2006 4:01:21 PM	4- Complete	29.00
	02- Full Clean	WHI05	12/29/2006 11:49:00 AM	12/29/2006 2:19:19 PM	4- Complete	42.50
	02- Full Clean	RGR17	12/29/2006 9:45:10 AM	12/29/2006 11:33:58 AM	4- Complete	27.00

Parameters

- Date Range
- Appear on separate pages
- Include Waiting Tasks
- Include Work Orders
- Select Employee(s)

Employee Instruction Card

The Employee Instruction Card provides instructions on how to log into HMS.


Employee: 001 Matt Powell		
Buehner-Fry Phone Instructions		
In Unit with a BFI Phone	01 Departure Clean	2 In Process
Lift the receiver and press *3	02 Inspection	3 Incomplete
Enter your Employee ID: 001	03 Deep Clean	4 Complete
Enter the 1-digit Status Code	04 Maintenance	
Enter the Task Code/WO# followed by the # key	05 Pool Clean	
Wait for Thank You	06 Hot Tub Clean	
	07 Lawn Mow	
In Unit No BFI Phone		
Dial 1-800-805-6484 or 1-888-808-1750		
Enter your Employee ID: 001		
Enter the 1-digit Status Code		
Enter the Task Code/WO# followed by the # key		
Wait for Thank You		

Parameters

- Appear on separate pages
- Instructions
- Select Employee(s)
- Select Task Code(s)

Employee Team Report

The Employee Team Report is used to show data on a group of 2 or more employees working on the same task within a specified unit.


 Team Task/WO by Unit 12/28/2006 Thru 12/29/2006					
Unit	Task	Employee	Start Time	End Time	Amount
CIN03	11- Inspection				Designated Amount: 0.00
			12/28/2006 3:45:25 PM	12/28/2006 3:49:58 PM	12/28/2006 3:49:59 PM 0.00
			12/28/2006 3:45:47 PM	12/28/2006 3:50:17 PM	12/28/2006 3:50:19 PM 0.00
CRG04	02- Full Clean				Designated Amount: 39.80
			12/28/2006 12:51:25 PM	12/28/2006 2:11:24 PM	12/28/2006 2:11:26 PM 39.80
			12/28/2006 12:51:45 PM	12/28/2006 2:11:44 PM	12/28/2006 2:11:45 PM 39.80
CUL17	02- Full Clean				Designated Amount: 20.00
			12/28/2006 11:11:15 AM	12/28/2006 12:43:48 PM	12/28/2006 12:43:49 PM 20.00
			12/28/2006 11:11:15 AM	12/28/2006 12:43:48 PM	12/28/2006 12:43:49 PM 20.00
			12/28/2006 11:11:34 AM	12/28/2006 12:44:03 PM	12/28/2006 12:44:04 PM 20.00
			12/28/2006 11:11:34 AM	12/28/2006 12:44:03 PM	12/28/2006 12:44:04 PM 20.00
DIX03	11- Inspection				Designated Amount: 0.00
			12/28/2006 3:24:30 PM	12/28/2006 3:26:57 PM	12/28/2006 3:26:59 PM 0.00
			12/28/2006 3:24:49 PM	12/28/2006 3:27:17 PM	12/28/2006 3:27:19 PM 0.00
PAR07	02- Full Clean				Designated Amount: 34.40
			12/28/2006 8:05:37 AM	12/28/2006 9:16:48 AM	12/28/2006 9:16:50 AM 34.40
			12/28/2006 8:05:57 AM	12/28/2006 9:17:04 AM	12/28/2006 9:17:06 AM 34.40
RCC38	02- Full Clean				Designated Amount: 29.00
			12/29/2006 3:15:40 PM	12/29/2006 4:14:57 PM	12/29/2006 4:14:59 PM 29.00
			12/29/2006 3:41:48 PM	12/29/2006 4:13:58 PM	12/29/2006 4:13:59 PM 29.00
WIT12	11- Inspection				Designated Amount: 0.00
			12/28/2006 3:16:10 PM	12/28/2006 3:19:10 PM	12/28/2006 3:19:12 PM 0.00
			12/28/2006 3:17:00 PM	12/28/2006 3:18:52 PM	12/28/2006 3:18:53 PM 0.00

Parameters

- By Unit or By Task
- Select Unit(s)

Occupancy Change Report

The Occupancy Change Report provides a summary of all occupancy changes logged thru the system. The report also includes the method that the occupancy status was updated.


 Occupancy Changed Report for 12/29/06			
Unit Description	Change To	Changed Thru	Change Date
A0901	Occupied	Software	12/29/2006 11:54:50 AM
A1103	Occupied	Software	12/29/2006 5:04:06 PM
ALONG	Occupied	Software	12/29/2006 3:19:42 PM
B0105	Vacant	Software	12/29/2006 10:04:51 AM
B0502	Vacant	Software	12/29/2006 9:30:14 AM
B0504	Occupied	Software	12/29/2006 9:53:14 AM
B1101	Occupied	Software	12/29/2006 5:03:39 PM
B1204	Occupied	Software	12/29/2006 7:48:51 AM
BCHBZ	Vacant	Software	12/29/2006 8:38:54 AM
BLUEH	Occupied	Software	12/29/2006 2:25:27 PM
C0606	Occupied	Software	12/29/2006 11:56:00 AM
C1204	Occupied	Software	12/29/2006 11:56:22 AM
CHATE	Occupied	Software	12/29/2006 4:34:40 PM
CR301	Vacant	Software	12/29/2006 10:37:44 AM
D0304	Occupied	Software	12/29/2006 4:33:41 PM
DICE	Occupied	Software	12/29/2006 11:16:08 AM
DOLPH	Occupied	Phone	12/29/2006 9:39:27 PM
E0304	Occupied	Software	12/29/2006 10:12:34 AM
E0501	Occupied	Software	12/29/2006 11:57:18 AM
E0604	Occupied	Software	12/29/2006 7:47:56 AM
F2602	Vacant	Software	12/29/2006 12:20:37 PM
F703W	Occupied	Software	12/29/2006 10:49:17 AM
GV216	Vacant	Software	12/29/2006 12:20:13 PM
GV414	Occupied	Software	12/29/2006 3:08:52 PM
H1105	Occupied	Software	12/29/2006 7:48:31 AM
I0403	Occupied	Software	12/29/2006 5:08:11 PM
KW074	Vacant	Software	12/29/2006 12:17:57 PM
L0501	Occupied	Software	12/29/2006 2:01:38 PM
LIFE	Occupied	Software	12/29/2006 2:22:15 PM
M0512	Occupied	Software	12/29/2006 4:42:56 PM

Parameters

- Select Occupancy
- Select Where Changed From
- Select Date

Occupancy History Report

The Occupancy History Report provides a summary of all occupancy changes for a given date range. The changes are sorted in alphabetical order by unit.


 Occupancy History for 12/01/06 thru 12/29/06			
Unit Description	Change To	Changed Thru	Change Date
A0103	Occupied	Software	12/27/2006 5:30:32 PM
	Vacant	Software	12/8/2006 11:41:33 AM
	Occupied	Software	12/3/2006 12:57:32 PM
A0104	Occupied	Software	12/28/2006 8:22:03 AM
A0106	Occupied	Software	12/28/2006 3:35:56 PM
A0201	Occupied	Software	12/26/2006 2:45:46 PM
A0204	Occupied	Software	12/26/2006 2:48:39 PM
A0205	Occupied	Software	12/17/2006 7:53:02 AM
A0206	Occupied	Software	12/26/2006 2:49:11 PM

Parameters

- Select Occupancy
- Select Where Changed From
- Select Date Range

Work Order Report

The Work Order Report details the amount of time spent at a unit doing any work orders logged into HMS.


 Work Order Report for 12/01/2006 thru 12/29/2006						
Work Order	Employee	Unit	Start Date	EndDate	Status	Amount
002		MTH07	12/20/2006 1:01:29 PM	12/20/2006 1:01:29 PM	4- Complete	
013		KHC14	12/23/2006 8:59:07 AM	12/23/2006 8:59:07 AM	4- Complete	
013		DIX03	12/15/2006 2:01:52 PM	12/15/2006 2:01:52 PM	4- Complete	
017		QLN23			1- Waiting	
025		YEL26	12/23/2006 10:31:51 AM	12/23/2006 10:31:51 AM	4- Complete	
029		PVCH4	12/19/2006 1:16:51 PM	12/19/2006 1:16:51 PM	4- Complete	
111		RCC12	12/28/2006 12:36:17 PM	12/28/2006 12:36:17 PM	4- Complete	
111		LRK11	12/6/2006 2:59:36 PM	12/6/2006 3:10:25 PM	4- Complete	
210		PVCK6	12/23/2006 9:36:42 AM	12/23/2006 9:36:42 AM	4- Complete	
211		WHI20	12/28/2006 3:34:14 PM		2- In Process	
2321		PNB04	12/4/2006 9:29:47 AM	12/4/2006 9:29:47 AM	4- Complete	

Parameters

- Date Range
- Appear on separate pages
- Include Waiting Work Orders

Schedule Report

The Schedule Report provides details on tasks scheduled in the future along with any Unit Notes for the assigned units.


 Schedule Report -12/26/2006 Thru 12/26/2006			
Employee Unit	Address	Task	Scheduled Date
003- Thompson, Cynthia	B505	17505 Brandywine Rd	02- Inspection
	C148	148 Congress St	02- Inspection
	C607	20807 Coventry Cir.	02- Inspection
	D769	15769 Davis Rd	02- Inspection
	E331	51331 Evens Way	02- Inspection
	M225	3225 NW Metke Pl	02- Inspection
Count:			6

Parameters

- Date Range
- Include Anticipated Amount
- Select Employee(s)

Average Calculation Report

The Average Calculation Report is a statistical analysis of the HMS data, shown as an average in dollars per hour.



NAVIS

Employee Analysis Report for 12/24/2006 thru 12/31/2006

Employee	Unit	Task	Amount	Task Time	Dollars per Hr.	StartDate	EndDate
001- Powell, Matt							
	B326						
		01- Departure Clean	40.00	00:41:19	58.09	12/26/2006 8:22:41 AM	12/26/2006 9:04:00 AM
	C607						
		01- Departure Clean	40.00	00:37:00	64.86	12/26/2006 10:07:00 AM	12/26/2006 10:44:00 AM
	S195						
		01- Departure Clean	40.00	00:38:00	63.16	12/26/2006 1:25:00 PM	12/26/2006 2:03:00 PM
Totals for Employee:			120.00	01:56:19			
Average for Employee:				00:38:46	61.90		
002- Wick, Jeremy							
	B505						
		01- Departure Clean	40.00	00:37:00	64.86	12/26/2006 9:00:00 AM	12/26/2006 9:37:00 AM
	H731						
		01- Departure Clean	40.00	00:25:00	96.00	12/26/2006 11:33:00 AM	12/26/2006 11:58:00 AM
	P134						
		01- Departure Clean	40.00	00:23:00	104.35	12/26/2006 1:02:00 PM	12/26/2006 1:25:00 PM
Totals for Employee:			120.00	01:25:00			
Average for Employee:				00:28:20	84.71		
Report Total:			240.00	03:21:19			
Report Average:				00:33:33	71.53		

Parameters

- Unit vs. Employee
- Appear on Separate Pages
- Display Start & End Date
- Include Zero Amounts
- Include Zero Times
- Date Range
- Select Task(s)
- Select Unit(s)
- Select Employee(s)